

GUIDELINES FOR EXTENSION PROFESSIONALS ORGANIZING OUT-OF-COUNTRY PROGRAMS* FOR CLIENTELE

Conducted Under The Auspices Of The Ohio State University Extension

International study tours, trips, visits, and exchanges can be effective and valuable methods for furthering the mission and achieving objectives of the Ohio State University Extension. However, the planning, implementation, and evaluation of such programs exposes the organization to a different set of risks than is usually encountered in Extension programming conducted within the responsible Extension professional's customary territory. Therefore, the following guidelines have been established for use by Extension professionals planning trips for clientele groups.

1. Extension professionals who wish to plan and conduct international programs should do so in accordance with the policies and procedures outlined by Ohio State University Extension. International programs developed by Extension personnel and involving Extension clientele are expected to meet or exceed the standards outlined in the CRITERIA section of this document.
2. Approval or disapproval by Extension administration of international programs planned and conducted under the auspices of Extension will be based on criteria adapted from the "Standards for International Educational Travel Programs" of the Council on Standards for International Educational Travel (1993-94) and OSU Guidelines for Study Tours (1989).
3. An OSU Extension International Tour Request form is used to request permission from Extension Administration. This should be submitted as soon as the idea is conceived. If OSU credit will be offered, a six to nine month lead time is necessary.
4. The amount of lead time needed, and the complexity of the review process, may vary with the degree of risk associated with the program. The following chart provides a guideline for obtaining approval for some of the more common types of international Extension programs planned and/or conducted.

Individual(s) Necessary to Approve Study Tour Request	COUNTY PLANNED International Study Tour	DISTRICT PLANNED International Study Tour	STATE PLANNED International Study Tour
County Extension Agent	A	-	-
County Extension Chair	A	-	-
District Extension Specialist	I	A	-
District Extension Director	A	A	-
State Extension Specialist	I	I	A
Department Chair	-	-	A
State Extension Assistant Director	I	A	A
State Extension Associate Director	A	A	A
State Extension Director	A	A	A

A = Approval required from this source.

I = This individual(s) should be informed of the program through regular Extension communication and reporting systems.

* International tours, trips, visits and exchanges

5. Volunteers who wish to plan and/or conduct programs under the auspices of Ohio State University Extension must obtain prior approval from the Extension professionals responsible for said program.
 - a. Volunteers must meet the requirements and standards established by the Extension professionals and program areas with which they wish to work. For example, volunteers who wish to apply to work with the 4-H program must meet the requirements, guidelines, and standards outlined in the "Ohio 4-H Volunteer Involvement Packet".
 - b. To obtain approval for international programs, volunteers must submit a request to the Extension professional responsible for the program with enough lead time for the request to be reviewed and approved or disapproved by the Extension professional and Extension administrators as outlined in the preceding chart.

Volunteers should notify the Extension professional of their desire to plan and/or conduct international programs as soon as the idea is conceived. The Extension professional should provide feedback to the volunteer about whether or not the request is likely to be approved or disapproved, and what criteria must be met in order for approval to be given.

CRITERIA

The following checklist will be used in evaluating proposed programs:

a. Educational Perspective

The program must be designed to serve educational purposes, within the vision, mission and values of Ohio State University Extension. The educational goals and objectives of the program must be clearly established and delineated. Learning experiences appropriate for achieving these objectives must be outlined. An orientation program and post activity evaluation must be well planned and executed.

b. Financial

The program must be capable of generating revenue to cover all expenses. It shall have sufficient financial backing to protect all monies paid by participants and to ensure fulfillment of all responsibilities to participants. Participant fees must be fully paid in advance.

Program funds must be deposited and expended in accordance with the regular accounting procedures of Ohio State University Extension. The program must maintain adequate financial records to document all income and expenditures associated with the program. Provisions must be made for refunds in the event of cancellation.

Volunteers who provide leadership for international trips or exchanges must be bonded if funds of more than \$1,000 are involved. Adequate funds must be available to cope with unexpected incidents, such as illnesses, accidents or other unusual circumstances. O.S.U. Extension assumes no financial liability for such international programs arranged by volunteers or emeriti.

c. Promotion

The purpose, activities, and sponsorship of the program must be accurately and honestly represented in advertising and other promotional materials. All advertising and promotional materials shall identify the program sponsor as Ohio State University Extension. Any publicity distributed prior to the approval of the study tour, must indicate the offering is contingent upon approval by appropriate OSU Extension and University bodies.

All fees and other required or optional program costs to participants, along with the services to be provided, shall be fully disclosed to participants, prior to their enrollment. A clear explanation of criteria for refunds must be included.

d. Participant Selection

Participants must be carefully screened and selected on the basis of criteria appropriate to the program. Selection of participants must be completed sufficiently in advance of the participant's departure to ensure adequate time for preparation and orientation.

Screening procedures for homestay programs shall include personal interviews of participants.

To comply with University, state and federal regulations, participants may not be recruited for school athletic participation, household domestic service, employment, or other areas that might compromise the participant, Extension, or the University.

e. Accommodations/Placement

For placement programs which include a homestay:

1. Host families must be selected on the basis of criteria appropriate to the program.
2. Prospective host families must be personally interviewed in their home.
3. Participants and host families must be matched on the basis of criteria appropriate to the program.
4. Suitable orientation and training must be provided to the host family.

For programs which include accommodations other than a homestay:

1. Accommodations shall be arranged on the basis of criteria appropriate to the program.
2. Accommodations must be adequate with respect to location, cleanliness, safety, nutrition, and supervision.
3. Accommodations must be confirmed sufficiently in advance of the participant's departure from home.

f. Operations

1. Adequate care and supervision of participants must be ensured. The Extension organizers will provide adequate support services to assist with program-related needs and problems (for example, counseling services, emergency situations that may arise during the program, travel, medical care, language problems, changes in host families, etc.)
2. Organizers should clearly define for tour participants the extent of the participant's own responsibility for travel arrangements. As the participant's self-responsibility increases, liability for OSU decreases.

3. Both inbound and outbound participants will be provided with an identification card which includes the participant's name; the name, address, and telephone number of the accommodations or host where the participant will be staying; the name, address, and telephone number of the local representative of the program; the address and telephone number of the Extension Office responsible for the program. The participant's address and the name, address and telephone number of a person to be contacted in case of emergency will also be included.
 4. An effective system of screening, selecting, training, and supervising program representatives and group leaders will be maintained.
 5. The Extension professional (volunteer) responsible for planning the international sufficiently in advance of the participant's departure from the home country for questions to be clarified. Thorough, accurate, and continual communication will be maintained with all involved.
 6. Opportunity for discussing and processing will be provided for participants, host families (if used) and cooperating partners in the program. A post-program evaluation will be conducted, this may often include focus group interviews.
- g. Insurance
- Every participant must be covered with adequate health and accident insurance. Such insurance shall:
1. Protect participants for the duration of their international experience.
 2. Provide for the return of the participants to his/her home in the event of serious illness, accident, or death during the program.
- The program organizer shall provide participants, hosts, and appropriate Extension Administration with detailed printed information regarding the terms and limits of insurance coverage and procedures for filing a claim.
- h. Disclosure and Release of Claims
- All participants must be required to sign a disclosure and release of claims form which may be obtained from the Office of Legal Affairs. (A reference copy .is attached.)
- i. Adherence to Government and University Regulations
- All governmental regulations in countries involved in any exchange or other international activity conducted under the auspices of Ohio State University Extension shall be observed.
- All educational programs and activities conducted by Ohio State University Extension are available to all potential clientele on a nondiscriminatory basis without regard to race, color, creed, religion, sexual orientation, national origin, sex, age, handicap, or Vietnam-era veteran status.

Bg/kjc- 9/20/94

Disclosure and Release of Claims

The _____ program will require travel outside the United States. Therefore, prospective participants should be aware of certain conditions which they may face in some foreign countries.

- _ Health care, medicines and related services may not be as readily available, or of a quality comparable to those in the United States.
- _ Transportation may not be as reliable or subject to the same safety standards applicable to public carriers in the United States.
- _ Public safety personnel in foreign countries may not be able to provide a level of personal security comparable to that in the United States.
- _ The laws of many foreign countries do not provide for due process and individual rights to the same extent as the laws of the United States.

Participants in the _____ program will spend extended periods of time working and living with their foreign hosts, and supervision by Ohio State University coordinators will be minimal. Participants will be personally responsible for their day-to-day activities and for ensuring their health and safety during their stay in the host country.

Participants will also be responsible for obtaining their passports, visas, and health certificates, and for making travel arrangements to and from the host country. Participants will be assigned to _____. Their job assignments may consist of _____.

Participation in this program is not required for a degree at The Ohio State University. A prospective participant who is concerned about any of the risks or conditions described above should discuss them with _____. Participants are encouraged to have all their questions and concerns addressed before committing to the program.

In consideration for the opportunity to participate in the _____ program and the use of services and facilities made available by The Ohio State University and its employees, I do release and forever discharge for myself and my heirs, executors, administrators and assigns, The Ohio State University, and its officers, employees, and agents from all claims, demands, and causes of action for personal injury or any other damage which may arise out of or be in any way related to their negligence in connection with my participation in the program.

I understand that if I should violate the laws or regulations of any country visited as part of the _____ program. The Ohio State University will not be liable for such conduct. The University reserves the right (to be exercised by _____) to terminate my participation in the program for good cause and to return me to the United States without a refund of any unused portion of fees paid. I understand that if I should confront a legal problem, The Ohio State University cannot officially represent me or my legal interests in dealing with a foreign legal system; nor can the University assume any direct responsibility for the actions of a foreign government.

This agreement shall be construed in accordance with the laws of the State of Ohio.

Date Participant

OSU EXTENSION INTERNATIONAL TOUR REQUEST

Forward the completed request form and attachments to the Office of the OSU Extension Director prior to the initial advertisement of the study tour. Follow Extension Study Tour Guidelines.

Name of person requesting permission _____

Title _____ Date Submitted _____

Address _____

Telephone _____ Fax _____ E-Mail _____

A. STUDY TOUR INFORMATION

Title _____

Description (not to exceed 25 words) _____

B. GENERAL INFORMATION

1. This request has been discussed with and has the approval of the following individuals:

(List individuals)

2. Attach letters indicating concurrence or objections.

3. Previous offering of this study tour and number enrolling

4. Provide the rationale for proposing this study tour.

5. Attach the academic plan that includes participant learning outcomes and/or study tour objectives, topical outline and percent of time spent on each topic, methods of instruction, recruitment and promotion procedures, selection procedures and criteria, evaluation plans, orientation and debriefing plans and methods of dealing with language barriers and other program-related needs and problems.

6. Attach the administrative plan for the study tour that includes an itinerary, arrangements for travel, housing, meals, meeting rooms, excursions, insurance contingency plans including those for medical emergencies and a detailed budget. The budget should provide a breakdown of the costs of the study tour, the cost per individual participant, proposed arrangements for handling deposits of participant payments, procedures for disbursements of expenses and any arrangements with travel agencies, including discounts, rebates or other incentives available to the study tour leader.

C. EVALUATION

By signing below, the Extension professional(s) responsible for this study tour agree to furnish OSU Extension Administration and The Extension International Committee, no later than two months following the conclusion of the study tour, a report that evaluates the tour in terms of local preparations and other orientation efforts, the educational advantages and disadvantages of conducting the tour, a summary of participant evaluations, and suggestions for improving similar tours in the future.

Full documentation and reporting of expenditures is required within two months of return from the study tour. Copies should be provided to the immediate supervisor and the Associate Director.

Name and Title _____ Date _____

Name and Title _____ Date _____

<u>D. Signatures</u>	<u>Circle One</u>	<u>Date</u>
_____	Approve/Disapprove _____	
Associate Director		
_____	Approve/Disapprove _____	
Director		

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