



EDUCATIONAL TRAVEL PROCEDURE			
Policy Type	Academic	Initially Approved:	April 20, 2015
Policy Sponsor	Vice-President, Academic Affairs	Last Revised:	August 16, 2022
Administrative Responsibility	Vice-President, Academic Affairs	Review Scheduled:	2027
Approver	General Faculties Council		

A. Purpose

The purpose of this procedure is to give direction related to the implementation of the Educational Travel policy. This procedure provides specific instructions and guidance related to the scheduling, promotion, and safety of Ambrose-sanctioned educational travel. The intention is to maximize the benefits and minimize the risks of operating such programs, and to have contingency plans and procedures set up to respond to emergencies and other unexpected situations.

B. Relevant Documents

The following schedules, forms and documents, are related to the Educational Travel policy. These schedules, forms and documents may be changed or added from time to time by the VPAA, without approval of the General Faculties Council, where such changes or additions are in accordance with the policy.

- a. Annual Educational Travel Study Calendar – Schedule A
- b. Travel Study Leader Forms – Schedule B
 - i. Travel Study Leader Checklist (B1),
 - ii. Initial Application (B2),
 - iii. Risk Assessment (B3),
 - iv. Budget Template (B4),
 - v. Travel Itinerary with contacts (B5),
 - vi. Post-Trip Report (B6)
- c. Participant Forms – Schedule C
 - i. Educational Travel Study Application (C1),
 - ii. Assumption of Risk and Waiver (C2),
 - iii. Media Release (C3),
 - iv. Acknowledgement of Leadership (C4).

C. Educational Travel Study Feasibility and Scheduling

1. The Travel Study Leader will submit an Initial Application (Schedule B2) to their Chair (if applicable) and Dean or Associate Dean by November 30. The Initial Application will apply to any educational travel study to be offered in the next academic year, including the spring and summer that follows. (A full risk assessment, budget and complete trip planning documents will be required after approval.)

2. The Initial Application (Schedule B2) will include:
 - a. Location (or potential locations) of the Educational Study and an initial risk assessment of travel in those regions
 - b. Course name, curricular learning outcomes and links to broader program objectives
 - c. Changes and improvements since last offered (if this is a repeat initiative)
 - d. The Travel Study Leader's experience with international travel and leading groups
 - e. An initial assessment of the likelihood of sufficient student enrollment and a draft budget
 - f. Initial assessment of funding options and key financial considerations
3. The Dean or Associate Dean of the program where the educational study is located will consider the application for an educational travel study in the context of the applicable program, faculty, and other programs.
4. If the Dean or Associate Dean approves, they will submit the Initial Application along with their recommendation to the VPAA by December 1 for discussion at Academic Council to ensure the proposed educational study trips have minimal overlap in destinations and timing, and minimize competition for participants.
5. Upon the approval of the VPAA, the educational travel program will be added to the Annual Educational Travel Study Calendar (Schedule A1). Once the study is on the calendar, it can be listed in the Course Schedule.
6. Educational travel studies can be promoted only when all planning documents are approved by the VPAA. Participant Educational Study Applications and deposits may be collected only when all planning documents are approved by the VPAA. Planning documents include a full risk assessment (Schedule B3), budget (Schedule B4) and trip itinerary and contact information (Schedule B5).

D. Risk Assessment

1. The Travel Study Leader will submit a Risk Assessment report (Schedule B3) to the VPAA at least six months prior to departure.
2. The Risk Assessment will include an assessment of risks, including mitigation and response plans, in the following areas:
 - a. Itinerary and local partners
 - b. Location specific – lawlessness, political unrest, natural disasters, unsafe infrastructure
 - c. Travel arrangements – getting to/from destination, in-country travel
 - d. Unfamiliarity with culture, including language and food
 - e. Physical well-being of participants – typical travel sicknesses, local diseases, immunizations, physical capacity
 - f. Mental well-being of participants
 - g. Personal safety
 - h. Safekeeping of valuables and other personal belongings
3. The Risk Assessment will include information on planned pre trip, during trip, and post trip meetings with students, as well as general plans for assessing and monitoring the trip readiness of the

students. Included in this section is an assessment of the types of physical accessibility accommodations that could be (or will not be available) throughout the trip.

4. The Risk Assessment will include response plans for specific types of emergencies:
 - a. Property
 - b. Medical
 - c. Nature
 - d. Crime and violence
 - e. Death
5. The Risk Assessment will include information regarding required insurance.
6. See the Educational Travel policy for the risk assessment criteria that will be used for approval by the VPAA (or their delegate), in consultation with the Health, Safety and Security Coordinator and the Travel Study Leader.
 - a. If the risk level is deemed unacceptably high at any time, even after the risk assessment is completed, the VPAA, in consultation with the Travel Study Leader, will cancel or cut short the trip.
7. If the VPAA, in consultation with the Health, Safety and Security Coordinator and the Travel Study Leader, determines that a Tour Operator is required, the Travel Study Leader will identify a potential operator. Approval of the Tour Operator by the VPAA will be secured before proceeding with further trip planning.
8. The Travel Study Leader will register the trip and participants with the applicable local Canadian embassy.
9. The Travel Study Leader will ensure that plans are in place for travel insurance or loss of deposits or both with respect to all pre-paid items in the event of a trip cancellation.
10. For the safety of the individual and group, all participants will follow the directions provided by the Travel Study Leader. Indication of participant awareness and commitment to adhering to this leadership will be indicated through completion of the "Acknowledgement of Leadership - Schedule C4. Leadership of the travel study group is a responsibility that extends 24 hours a day for the entire length of the trip.

E. Trip Preparation and Information

1. The Travel Study Leader will prepare a budget in accordance with Budget Template (Schedule B4), and provide for a nil or positive balance following the educational study.
 - a. The budget is to be approved by the VPAA prior to collecting deposits.
 - b. The Travel Study Leader will develop and carry out a plan for participant payments and trip expenditures, in accordance with any policies or direction provided by the finance department.
 - c. The Travel Study Leader may consider relevant program bursaries, personal fundraising, government grants, and other funding options for trip participants.

2. The Travel Study Leader will hold meetings and disburse information to students on itinerary, costs, and risks.
3. The Travel Study Leader will provide all requested information to the Dean or Associate Dean and other departments for purposes of broader promotion and communication of international learning opportunities.
4. The Travel Study Leader will emphasize to participants the importance of being of sound physical and mental health prior to the trip. In consultation with the Health, Safety and Security Coordinator, the Leader will confirm that no student has a record of misconduct that may indicate increased risks to self or other participants, to the reasonable knowledge of the Travel Study Leader. Any concerns must be reviewed with the VPAA.
5. All trip participants must review, sign, and adhere to the following (with guardian signatures as applicable where under 18), in addition to any other requirements or forms that may be added from time to time:
 - a. Ambrose's Community Standards.
 - b. Educational study application form (Schedule C1), which includes proof of documentation.
 - c. Assumption of risk and waiver form (Schedule C2).
 - d. Media release form (Schedule C3).
 - e. Acknowledgement of leadership form (Schedule C4).
6. All participants will have proof of the following required travel and legal documents:
 - a. Passport
 - b. Immunization papers
 - c. Applicable travel visas
 - d. Travel and medical insurance
7. A complete set of travel documents will be provided to the applicable Dean/Associate Dean and the VPAA prior to travel:
 - a. Copies of all forms and documents set out in E5 and E6 above, in addition to any other forms accompanying the Educational Study Application.
 - b. Contact information for the Travel Study Leader and an alternate, and;
 - c. Travel itineraries for all segments of the trip (Schedule B5), including any exceptions to the main group's itinerary.

C. Trip Confirmation

1. The Travel Study Leader will communicate with the Dean/Associate Dean that sufficient participants are registered four months prior to the trip, and communicate accordingly to the participants if the trip is not feasible.
2. The Travel Study Leader will confirm with the Health, Safety and Security Coordinator that no new concerns have arisen with respect to the Risk Assessment before departure.
3. The Travel Study Leader will review and confirm with the Dean that all steps on the Checklist (B1) are complete.

D. Responding to Emergencies

1. The Travel Study Leader, in consultation with local partners, will exercise due diligence with respect to emergency care preparation (e.g. location of hospitals, additional protocols, etc.).
2. During the trip, the Travel Study Leader will consult with the VPAA and Health, Safety and Security Coordinator, when making emergency response decisions.
3. In consultation with the Health, Safety and Security Coordinator, the VPAA is responsible for making emergency response decisions and has authority to overrule the recommendations of the Travel Study Leader.
4. In the event of an emergency, the VPAA, in consultation with the Health, Safety and Security Coordinator, will determine the most appropriate way for information to pass between participants, local authorities, Ambrose and families of participants.
 - a. The VPAA may appoint a public spokesperson to inform participants' family members and the media of the emergency, according to institution's emergency response plans.
 - b. The VPAA will arrange for post-crisis care of participants after an emergency (e.g., debriefing and counselling of participants, dealing with PTSD).
 - c. In consultation with the Travel Study Leader and the Health, Safety and Security Coordinator, the VPAA will conduct a post-crisis evaluation.

E. Post-Trip Reporting

1. The Travel Study Leader will submit all expenses and any other financial reporting required.
2. The Travel Study Leader will complete any necessary post-trip reporting related to grants.
3. The Travel Study Leaders will complete a Post-Trip Report (Schedule B6) for the VPAA, to include an overview of activities and outcomes, areas of concern, and a financial report.
4. The Travel Study Leader will provide all requested information to other departments for purposes of broader promotion and communication of international learning opportunities.
5. The Travel Study Leader will submit all trip documents (i.e., all Travel Study Leader and Participant forms) to the Dean who will ensure they are stored on Sharepoint for four years.