

Return to Travel

Policy and Practice for a Safer Journey





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Preface



Despite the current environment of not being able to travel freely, we know that one of these days, our campus constituents are going to begin testing the travel waters, especially the waters of international travel. It is imperative that we international educators recognize that we have an opportunity right now. This is our opportunity to create or to review our policies and practices in order to have them ready for when travel restrictions begin to lift.

Learn how two universities reevaluated and restructured their travel policies in this *Return to Travel* E-Book.



TRAVEL POLICY CREATION AT **TEXAS CHRISTIAN UNIVERSITY**

Policy creation, or reevaluation, is especially relevant at this time as we have learned lessons from Spring 2020 and as we consider the return to travel. In a recent **Terra Dotta webinar**, Dr. Sandra Callaghan at Texas Christian University (TCU) shared their policy approach that covers international travel, as well as study abroad.

When considering a successful or effective approach to travel policy, it's important to first consider institutional characteristics >

When Dr. Callaghan assumed the director role three years ago, TCU's travel policy was loosely defined, emergency response was not guided by established protocols, and some policies were outdated while others were weak. Her first goal, therefore, was to provide some structure and establish policy—a process that took about two years.

TEXAS CHRISTIAN UNIVERSITY AT A GLANCE

- > Mid-sized, private institution
- > Approximately 11,500 students, 9,700 undergraduates
- > 35% of students study abroad
- > High faculty interest in study abroad
- > High level of employee travel



Build Your Case

Dr. Callaghan's first step in creating a centralized policy was to build a case and articulate the need for the policy. The most significant resource in building the case was an external audit of programs, processes, and procedures related to study abroad and international travel. The audit uncovered several weaknesses and risks, which helped determine how she would proceed. She also benchmarked across peer institutions and, because the policy had broad impact, made sure that she could articulate to various constituents why this policy is needed.

Moving forward, Dr. Callaghan positioned the policy with respect to risk mitigation which included health and safety risks, financial risks, and reputational risk for the institution.

Clearly Define Your Objective

Now, it's time to identify your target. Solving everything on your first pass may make the process more difficult if not impossible to achieve. Therefore, start by identifying what you can realistically solve in the near term. For Dr. Callaghan, that was international travel and study abroad within academic affairs. Because these were areas that her office had more control over, this is where she started in her policy creation journey.

As the process proceeded, however, she began to gain traction from student affairs, administrative organizations, and even athletics. By bringing in interested stakeholders

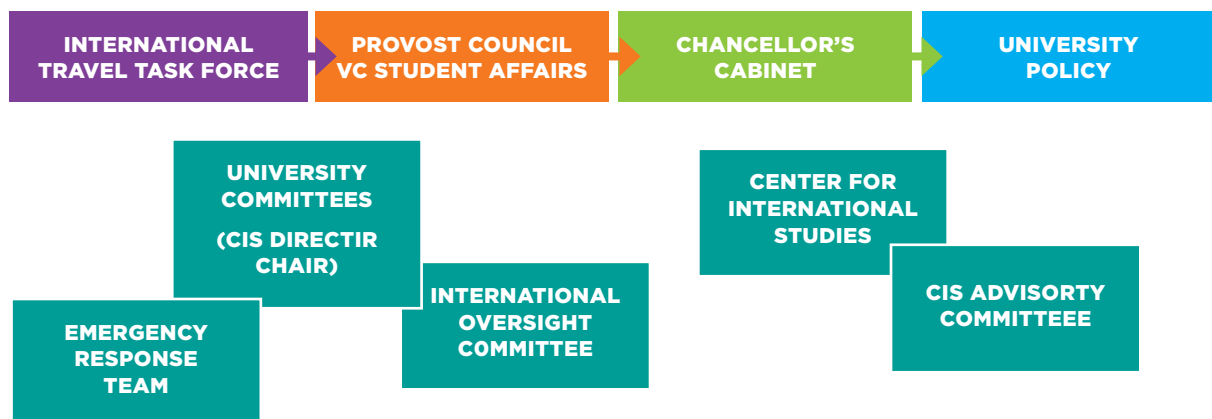
from those areas to work on a policy, Dr. Callaghan was able to achieve her ultimate goal, a single university policy. While a single university policy was her original objective, identifying attainable goals along the way were her first priority and important to her success.



Patience and Positioning

Dr. Callaghan noted that in defining how you want to move forward, it's important to have patience and to always position your objectives in a way that the campus community understands. She said, "This was not an easy process across our campus; it pushed a lot of buttons in a lot of different units. As evidence, it took me two years to get through this policy."

She further emphasized, "Be deliberate, clear, and inclusive." One of the ways in which she did this was by creating the image below, so everyone she presented to understood what the proposed structures and processes looked like in a very clear way.



For example, the process for policy approval was to start with several different bodies, including an international travel task force that was inclusive and had a clear charge. It was then passed on to the Provost Council and to Student Affairs, and finally to the Chancellor's Cabinet.

This image was just one way in which she helped stakeholders visualize what needed to be centralized and how. In addition to the visual, she also had examples on-hand of recent student, employee and program issues in order to demonstrate the need for policy to mitigate risk.

Build Support

By working with various departments, Dr. Callaghan also had a growing level of support, and she never turned down an invitation to discuss international travel policy. In numerous meetings, she made key partners who had similar interests; those included risk management, financial services, and legal counsel. By coming together, they were able to develop a policy that met shared objectives and involved key functions.

Demonstrate Expertise

Everyone on campus tends to know a little bit about international travel and study abroad, but what they may not realize is that efforts of international offices are also driven by research. It's your challenge to demonstrate your expertise and help them understand why the decision-making and policy creation needs to run through international education offices.

Dr. Callaghan added, "We engaged Terra Dotta, we engaged our travel assistance provider, and we invited them to campus for different reasons. They helped as we connected with our administration, and made our case for a stronger policy."



Never let a good
crisis go to waste.

—WINSTON CHURCHILL

Moving Forward

Lastly, Dr. Callaghan mentioned that it is important to remember that you will always be presented with opportunities and with more issues to solve. She commented that you have to understand where your university's current priorities and environment. For Texas Christian University, they were at a point of getting policy fatigue. Now, coming out of COVID-19, she sees a huge opportunity to move the bar further.

"So don't let this crisis go to waste. Start making plans and thinking about how you can move your bar to the next level." —Dr. Sandra Callaghan.



STRATEGIC PLANNING AT **SOUTHERN METHODIST UNIVERSITY**

Allison Russell, Director of Global Preparedness and Response at Southern Methodist University (SMU), also presented during the Terra Dotta webinar. For SMU, they were at a different stage of policy creation: strategic planning. This phase involves establishing a foundation for the travel policy and processes for the university as a whole.

Let's take a look at Southern Methodist University ➤

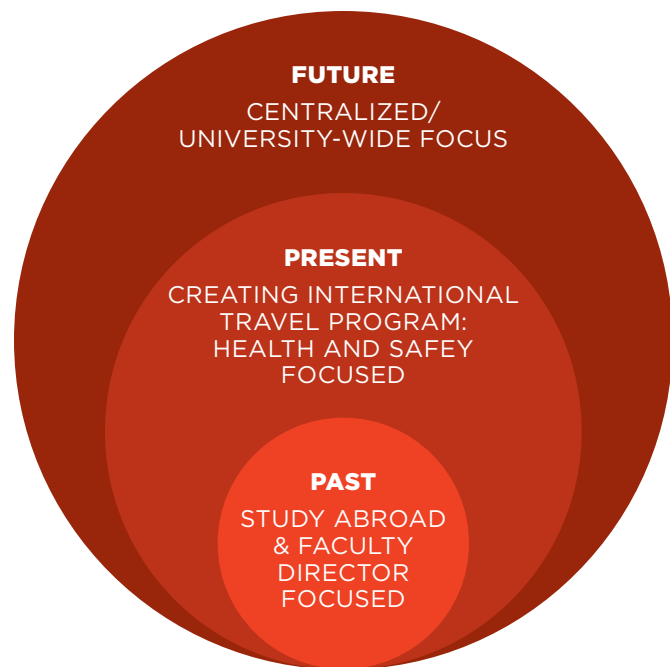
SOUTHERN METHODIST UNIVERSITY AT A GLANCE

- Mid-sized, private institution
- Approximately 11,600 students, 6,400 undergraduates
- 23% of students study abroad
- High level of research-based travel
- Multiple international trips imbedded in colleges across campus



RUSSELL stepped into her position just over a year ago after having served as the Health and Safety Manager in SMU's Abroad office. Immediately, she identified some key challenges to the success and effectiveness of their travel policies.

- Decentralized international travel operations
- No guidance over international travel policy or processes
- Poor compliance on travel registration
- Decentralized software programs for international travel





Russell noted that their main challenges lay within not having a tracking method for any of the trips. She said, “When they’re abroad, we may not even know where they are, what they’re doing, what their time frame is for traveling. And so it presents a problem with our ability to appropriately respond during an emergency, or like we saw earlier this year, a global pandemic.”

Russell’s main focus was and is still to streamline processes with an emphasis on health and safety, and to make sure that SMU has the appropriate measures in place to be able to respond to emergencies and effectively communicate with travelers abroad. Her end goal is to centralize SMU’s travel program to be able to support all international travelers, not just undergraduate study abroad.

Implementing Tools to Work Smarter

As Russell started to overhaul their existing travel policy, one thing that she set out to accomplish was to establish a single portal system for registration of all travelers to reach her goal of locating travelers and effectively communicating through a reliable tracking platform.

Southern Methodist University chose Terra Dotta to meet their needs. Right now the university has a trio of Terra Dotta’s **Outgoing Solutions**: Study Abroad, Travel Registry, and AlertTraveler®. However, Allison’s focus lies with Travel Registry and AlertTraveler®. Some of the features important to her office are the workflow tools that automate approval processes, pre-departure orientations, and emergency notifications pushed through AlertTraveler®.

RETURN TO TRAVEL WITH **TERRA DOTTA**



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- ▶ Mitigate institutional risk and drive compliance
- ▶ Streamline workflows and leverage data analytics to ease reporting requirements
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ALERTTRAVELER®

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Want to learn more about how Terra Dotta can help with the return to travel?

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