

Chazen Leadership Fellows Program Chazen Global Study Tour Application for Student Leaders

Requirements

- Information sheet
- Essay
- Risk Assessment
- Tentative budget
- Potential funding sources
- Tentative Itinerary
- Resume of each student leader
- List of proposed faculty advisors
- List of proposed corporate contacts

Important Dates and Submission Guidelines

- Please submit materials electronically to chazen@columbia.edu or drop off a hard copy at the Chazen Institute in room 2M2 Uris Hall (In staircase Y or Z, the two closest to the elevator).
- When submitting your application, please give at least two options for interview slots (allow for one hour). All student leaders must attend.
- If accepted, all student leaders must attend two mandatory training sessions. Time and date TBD.

Responsibilities of Tour Leader

- **Overall success of the trip**
 - Take an active, organizational role
 - Plan in advance
 - Keep the study tour within budget
 - Have an academically-focused Itinerary
 - Have a high level of student satisfaction
 - Handle safety and risk management issues properly
 - Communicate regularly with faculty advisor and Chazen Institute staff
 - Understand and abide by Chazen and Business School policies and standards of conduct

NOTE: At least two student leaders must accompany the study tour. Leaders on the study tour must attend the tour in its entirety.

- **Required post-tour deliverables – due one month after the trip**
 - Detailed final itinerary including contact information of companies visited and alumni contacted
 - Budget Reconciliation
 - Tour debriefing with faculty advisor and Chazen staff

Throughout the duration of your leadership as a student leader:

Tour leaders are expected to comply with all laws both for the United States and the countries to be visited and Columbia Business School policy and standards of conduct. Tour leaders should also understand relevant Chazen Study Tour policies (handbooks will be available after approval) and be prepared to explain these policies and processes to fellow students. By submitting an application for consideration, student leaders agree to fulfill these requirements should their tour be approved. Failure to

abide these policies can result in forfeiture of student leader benefits including the tour subsidy and extra bid points and removal from the Chazen Leadership Fellows Program.

Essay

In a one page essay, please describe:

- Why you are interested and capable to organize a successful study tour; your past experience in managing group events
- What is your vision for the trip; what are the goals/objectives/themes; why now?
- What is your experience/expertise in the region? Why you chose the country(ies);
- What are the main business opportunities? What challenges are specific to your region?
- The roles of the members of the tour planning team

Risk Assessment

Use the grid below to identify and rate the health, safety, security and natural disaster risks for each of the locations to which you will be traveling. Explain how you would mitigate the risks identified.

We recommend that you look at the following resources for your risk assessment:

Centers for Disease Control and Prevention: www.cdc.gov

The Overseas Security Advisory Council (OSAC): www.osac.gov

Also view the travel advice from the following countries:

United States: <https://travel.state.gov/content/passports/en/alertswarnings.html>

United Kingdom: <https://www.gov.uk/foreign-travel-advice>

Canada: <https://travel.gc.ca/travelling/advisories>

Australia: <http://smartraveller.gov.au/Countries>

LOCATION: _____

Health	Low <i>No/Limited Foreseeable Health Threats</i>	Medium <i>Food-Borne Illness, Mosquito-Borne Diseases (Malaria, Dengue, Chikungunya, Zika), Yellow Fever, Air Pollution</i>	High <i>Epidemics / Pandemics of untreatable fatal or debilitating diseases (Ebola, etc.), Low quality of medical care</i>
Safety	Low <i>Low Crime</i>	Medium <i>Petty Crime (Pick-Pocketing and Street Scams), Poor Road Safety, Animal Threats (Bites or Attacks)</i>	High <i>Violent / Gun Crime, Sexual Assault. Kidnapping</i>
Security	Low <i>No/Limited Foreseeable Security Threats</i>	Medium <i>Political/Social Protests, Strikes, Corrupt Police Force, US Travel Alert In Place</i>	High <i>Terrorism, Political Instability, US Travel Warning In Place (Level 3 or higher)</i>
Natural Disaster	Low <i>No Foreseeable Natural Disaster Threat</i>	Medium <i>Flooding, Fires, Snowstorms/Rainstorms, Heat Waves, Extreme Cold</i>	High <i>Volcanic Eruptions, Earthquake, Tsunamis, Hurricane/Tornado, Land Slides</i>
Other Risks			

NOTE: Study tours will not be approved to cities/countries that are listed as high health, safety, or security risk without prior approval.

Budget

Draft budget should include airfare, lodging, ground transportation and some group meals. Note that many online websites show discounted hotel and airfares which may not be available for group rates. All study tours must use a travel agent (exceptions to this rule must receive prior approval).

Funding Sources

If applicable, describe your fundraising strategy and list all probable sources of funding. NOTE: *You must receive prior approval from the Chazen Institute and External Relations for all fundraising activities.*

Itinerary

Create a draft itinerary for the study tour listing travel dates, cities to be visited, company/nonprofit/government meetings, and planned visits to cultural sites. Sample itineraries are available at the Chazen Institute or online. Strong itineraries strike a good balance between academic and experiential learning. Business days should be full and the related travel plans should maximize the available time during the working week as much as possible. Activities and meetings should provide a broad perspective and encompass business, politics, the economy and social issues.

No official tour activity may overlap with any student's academic obligations – including time it would take to travel. In the spring, pay close attention to exam dates for both 1st and 2nd year students. For winter tours, please note that internship recruiting for 1st years takes place one to two weeks before classes start. You are not required to finish by this week, but it is recommended if possible based on the best time to visit your region. For May, note that the tour dates may overlap with university commencement and graduation for second years. August study tours should take into account exam dates as well as internship schedules. **All participants, including tour leaders, are required to be present for all dates of the study tour.**

Faculty Sponsor

Please list the name(s) of faculty member(s) that you would like to approach and explain why you have chosen him/her. NOTE: *Please do not contact any potential faculty sponsors until the faculty has been approved by The Chazen Institute.*

Company Contacts

Please list the companies that you would like to contact, explain why you have selected them and what you will be asking from them, i.e. differentiate between fundraising and visits. Also differentiate between companies where you have contacts versus those you plan on cold calling.

Criteria for approval

- Quality of leadership team including team dynamics, level of commitment, relevant experience
- Quality of the application - budget, itinerary, company contacts. Your planning begins with your application demonstrating that you have carefully planned and considered various possibilities.
- Academic/Business relevance
- Addressed risk concerns (possibility of health, safety or security risks as well as contingency plans)

If your study tour is approved, student leaders will receive the following:

- Induction into the Chazen Leadership Fellows Program
- Support and active advising from the Chazen Institute
- Support from Corporate Relations, Career Services, Alumni Relations and others in the School relevant to planning the tour, including support for emergency and risk-related situations
- Use of the Columbia Business School name when securing visits, meetings, etc.
- Subsidy of program costs of up to 3 tour leaders upon successful completion of the tour. Airfare excluded. (Split amongst organizing teams of larger than 3 tour leaders. Airfare excluded.)
- Extra Chazen bid points toward future study tour bidding for a tour leader for every 10 participants (up to 4 student leaders)
- Accompaniment of one Columbia Business School faculty advisor throughout the tour (expenses born by the Chazen Institute)

Chazen Study Tour Information Sheet

Cities to be visited: _____

Travel dates: _____

Tour leader _____

Will attend tour: Yes/No (circle one) Term at CBS: _____

Email: _____ Phone: _____

Tour team member* _____

Role: _____

Will attend tour: Yes/No (circle one) Term at CBS: _____

Email: _____ Phone: _____

Tour team member* _____

Role: _____

Will attend tour: Yes/No (circle one) Term at CBS: _____

Email: _____ Phone: _____

Tour team member* _____

Role: _____

Will attend tour: Yes/No (circle one) Term at CBS: _____

Email: _____ Phone: _____

Tour team member* _____

Role: _____

Will attend tour: Yes/No (circle one) Term at CBS: _____

Email: _____ Phone: _____

**Study Tours are very hard to plan alone – most tours have 2-4 student leaders depending on the size of the group. The smallest we have had is 2 student leaders, the largest 6.*

Contact the Chazen Institute for more information or with questions:

Phone: (212) 854-4750

Web: www.gsb.columbia.edu/chazen

E-mail: chazen@columbia.edu

Location: Uris Hall 2M2 (staircase Y or Z)

Recommended Timeline

Throughout, the organizing team or team leader should plan to submit updates or meet with Chazen staff to brainstorm and flush out the itinerary. The team should also update and discuss with the faculty advisor throughout the planning process.

5 – 8 months prior to Tour:

- Create tour leadership team
- Select destination, dates and length of time in each city (keep in mind local holidays)
- Develop fundraising strategy with and submit prospective company list to Corporate Relations
- Brainstorm itinerary
- Confirm your faculty advisor
- Research travel providers. For destinations that fill up quickly, reserve air tickets and hotel rooms
- Liaise Chazen Institute for list of alumni in the cities you wish to visit or School connections such as through career services, professors or exchange partner schools.

4 – 5 months prior to Tour:

- If not already done, book airfares, accommodations and ground travel.
- Begin preliminary outreach companies and alumni
- Advertise tour to CBS students (indicate in all ads or promotion that this is a Chazen Study Tour)
- Conduct information session for students
- Begin receiving deposits from students
- Create a draft itinerary and submit it to the Chazen Institute and your faculty advisor

3 months prior to Tour:

- Continue arranging business meetings or events
- Inform students about visa/health immunizations as necessary
- Hold an informal social gathering for participants

2 months prior to Tour:

- Finalize itinerary (submit itinerary to The Chazen Institute and your faculty advisor)
- Secure all funding and finalize tour budget
- Collect readings for optional reading for students focused on region and visits
- Collect releases and payments from all students

In the weeks prior to Tour: (*late Nov. for Winter study tours, mid Feb. for Spring study tours, late April for May study tours, and early August for August study tours*)

- Finalize student list and rooming preferences
- Finalize hotel and travel arrangements
- Finalize Agenda Packet with itinerary for distribution to participants
- Reconfirm meetings
- Hold predeparture meeting with students
- Send any updated information about the region or companies