OVERVIEW

Tuck Global Consultancy (TGC) is a second-year, full credit elective course that provides students with the opportunity to lead, plan, and execute a real-world consulting engagement.

TGC engagements are focused typically, though not exclusively, in locations outside of the US, with students working in self-managed teams under the guidance of a Team Advisor. TGC is largely self-funded through client sponsorship and fees, and acceptance into the course is by application. The number of students accepted in the course is dependent upon the number of projects contracted.

The purpose of this handbook is to provide detailed information about TGC processes and logistics – both for students who have applied for participation, and for students who have been assigned a TGC project. *For academic information, please refer to the course syllabus.*

Contact Information

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<th>Name</th>
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</tr>
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KEY TUCK GLOBAL CONSULTANCY PROGRAM DATES 2014 - 2015
*Dates change slightly year to year, but occur at relatively the same time*

**Summer Track (2014)**
Client commitment by: May 16, 2014
Phase One: June 9 - August 15, 2014
Phase Two (travel dates): August 18 - September 5, 2014
Phase Three: September 8- October 3, 2014

**Winter Track (2014-2015)**
Client commitment by: September 15, 2014
Phase One: October 6 - November 21, 2014
Phase Two: December 1 - December 19, 2014
Phase Three: January 5 - February 6, 2015
Spring Track (2015)
Client commitment by: January 30, 2015
Phase One: February 9 - March 6, 2015
Phase Two (travel dates): March 9 - March 20, 2015
Phase Three: March 23 - April 17, 2015

*This track requires clients to hire a summer intern.

**Students must arrive in country no later than Sunday at 5pm, before the first Monday in-country. Students must depart no earlier than the Saturday morning after the last Friday in-country.

TEAM SELECTION AND NOTIFICATION PROCESS

The TGC application process is open to all second-year students. The number of students accepted into TGC depends on the number of paid consulting assignments the TGC Program Office can generate. As a result, we are not always able to place all interested students on a project team.

As often is the case with real-world consulting engagements, many clients commit to a project at the last possible moment when an immediate business need or opportunity arises. Therefore, ambiguity and uncertainty may exist regarding the number of students who can be accepted into the course. Our goal is always to place as many students on a project as possible. The process is follows:

- Once a project is confirmed, the team selection process begins. Team selection is based on several factors, including but not limited to: fit between project parameters and student education, experience, and expertise; as well as, balance along a variety of dimensions, including gender and nationality. Notification of team assignment is by email. Emails include as much information as is available at the time (including preliminary scope of work, target venue(s) for Phase Two, etc.). Students must confirm participation, by email, on a team within 48 hours of receiving an invitation.

- Students who decline a team assignment hoping for another project invitation will remain in the applicant pool (if they wish), but risk not receiving another invitation. If students delay longer than 48 hours to confirm their participation, another student may be invited in their place.

Once the team is staffed, students are notified of the final team composition, and Phase One officially begins.

To reiterate, the number of students accepted in the program depends entirely on the number of clients ultimately recruited.

However, in rare instances, a student who has not applied via the standard TGC application process may be asked to join a team due to a unique and/or unusual skill-set that is essential to the success of a project, often at the client’s request. This skill-set may take the form of language competency, cultural expertise, specific work experience, etc. We make every effort
to place those students who have applied through the established process before searching for specific skill-sets outside the TGC applicant pool.

**PROJECT PHASES AND REQUIREMENTS**

The course is organized into three phases with work requirements spanning two terms.

Project teams are typically comprised of six students. Individual roles on a team may vary depending on the nature of the project, scope of work, and team preferences, and are determined by the team in Phase One. Team roles may include a Project Manager, Client Liaison, Presentation Lead, etc. We suggest, at the least, a Project Manager and Client Liaison.

**Phase One** is conducted in the US and lasts three to five weeks. The expected workload is that of mini-course (sometimes more). Expectations for students include:

**Project-related requirements:**

- Attend a kick-off meeting with other team members and your Team Advisor; choose a Project Manager and Client Liaison at this meeting
- Contact Feldberg librarians to begin secondary research, including general information about the sector and specific information regarding the client before the first client call
- Engage the client on an initial call, even if the entire team cannot attend
- Obtain, review, sign, and return any confidentiality letter and/or non-disclosure agreement (NDA) to client; consult with TGC Program Office for assistance
- Schedule and attend regular conference calls (or on-campus meetings, if possible) to meet the client and understand/refine the project objectives and scope; clarifying and confirming the scope is essential to a successful outcome and productive Phase Two
- Review all materials provided by the client and continue any secondary research
- Prepare client engagement letter; this document formalizes the understanding with the client about project’s parameters, including scope, deliverables, and other specifics
- Prepare a preliminary project work plan for review and approval by the client
- Confirm the project’s work plan prior to Phase Two
- Schedule a substantial number of interviews for the first week of Phase Two, leveraging the client's contacts, if/when appropriate
- Submit required deliverables* to Team Advisor and the TGC Program Office by the deadline on the syllabus, including fully executed engagement letter, NDA (if applicable), work plan, etc.

*Document samples are available in Course Files folder on the Public drive; Fall -> Elective -> TGC

**Planning and logistics requirements:**

- Double check that your passport is valid for six months after the end of Phase Two
- Review project budget details communicated by the TGC Program Office
- Arrange necessary conference call information at the beginning of their projects (contact TGC Program Office for details)
• Reserve necessary conference rooms and the requisite audio/visual equipment for team meetings and client calls during Phase One
• Check project country’s embassy website for visa requirements and communicate information to TGC Program Office
• Check health needs and schedule an appointment at Dick’s House. If you are a US citizen, and it is required, register with the US Department of State’s Smart Traveler Enrollment Program: https://travelregistration.state.gov/ibs/ui/; make travel arrangements with support from the TGC Program Office

**Phase Two** is conducted in the field at the venue(s) specified by the client, and is three weeks in length. It is a very focused and an intense period of time where students are expected to be working full-time, and which may include significant travel. Students must be physically present for the entire three weeks.

**Project-related requirements:**
• Meet client (if in-country) to confirm the work plan and objectives for Phase Two
• Schedule additional interviews (40+) beyond those already organized for the first week
• Collect primary research, through interviews, focus groups, surveys, etc.
• Meet regularly with, and provide regular updates to, your Team Advisor
• Focus on primary research, but continue secondary research as needed
• Synthesize and analyze data, and in order to formulate recommendations
• Prepare and present a preliminary presentation to the client

**Planning and logistics requirements:**
• Keep accurate records and receipts of all project-related expenses, ensuring strict adherence to any requisite project budget requirements
• Handle any additional logistics needs arising during, with support/guidance from your Team Advisor and the TGC Program Office

**Phase Three** is conducted in the US, lasts three to five weeks, and has an expected workload of mini-course.

**Project-related requirements:**
• Reserve two 90-minute class times per week for TGC work during the first four weeks in the term following the team’s return
• Meet regularly as a team to refine final presentation, while remaining on contact with the client and responding to additional requests
• Meet several times with the Team Advisor to review progress toward final deliverable(s)
• Hold regular conference calls with the client within four weeks upon returning
• Complete data research, synthesis, and analysis
• Prepare final conclusions and recommendations
• Present a substantial final presentation to the client and TGC Program Office via video-conference from Tuck or at the client's office, if feasible
• Submit final deliverable(s) PowerPoint slides and supporting materials (interview summaries, background data, etc.) to the client, Team advisor, and TGC Program Office
• Complete the required peer evaluation and overall course evaluation

Planning & Logistics Requirements:
• Schedule final client presentation in coordination with TGC Program Office, ensuring that the TGC Director is available to attend
• Reserve necessary conference rooms and the requisite audio/visual equipment for team meetings and client calls during Phase One
• Submit completed expense reimbursement form to TGC Program Office
• Prepare a one-page synopsis and a maximum three-sentence synopsis of the project and submit to the TGC Program Office

POLICIES

Grading
Final grades reflect individual and team performance on the project as follows:

50% Individual contribution throughout all phases of the project, including:
  • Interactions with the client and teammates
  • Participation in the development and presentation of client deliverables
  • Participation in required TGC activities (weekly meetings with Team Advisor, mandatory Phase 1 sessions, peer/self-evaluation, final debrief, etc.)
  • Demonstration of professionalism throughout the project
  • Ability to reflect upon and articulate key lessons learned during the project as assessed through a final reflection paper

50% Team performance, including:
  • Quality of client deliverables (letter of engagement, work plan, preliminary and final presentations, recommendations)
  • Timely delivery/responsible handling of administrative items
  • Ability of the team to work effectively together, and with the client

The Team Advisor assigns student grades and evaluates performance, from the intellectual effort required to the timeliness of submitting paperwork, as if students were professional consultants. Feedback from multiple sources is considered, including client feedback, peer and self-evaluations, and TGC Director feedback.

As part of the course requirements, all students are required to complete a peer and self-evaluation at conclusion of Phase 2 of their project.

TGC is graded using the same letter system as other courses at Tuck (H, S+, S, LP and F). The TGC Director ensures that the Tuck grading curve requirements for 2nd-year courses is maintained.

Please consult the course syllabus for more detailed information on learning objectives, grading, workload, and required deliverables.
**TGC and Student Exchange Participation**

Students who wish to participate in TGC must commit to the entire project. If a student does an exchange during the Fall Term, s/he will not be able to participate during the TGC Winter Track, but may participate in the TGC Summer or Spring Track cycle. There may be some exceptions to this policy if the skills of a student are essential to a project's success and unavailable anywhere else in the applicant pool. Students may participate in TGC if they plan to do an exchange term following the in-country portion of the project.

Exchange students from other schools are also permitted to apply for participation in TGC, but priority for placement is reserved for full-time Tuck students, except when the skills of a specific exchange student (such as language/cultural competency) are considered essential to a project’s success.

**TGC and Spouses/Partners**

Spouses/partners are not permitted to accompany team members during the Phase Two, in-country travel portion of TGC projects.

**Free and Leisure Travel**

While outstanding project execution is the first priority, an important goal of TGC is to expand students’ international and cultural experiences. However, it is important to be sensitive to cultural differences and client perception when planning personal travel. The amount of free time to sightsee or travel can vary greatly by project. Students should discuss leisure travel plans with the Team Advisor and other TGC team members to ensure that it does not interfere with/take precedence over the needs and expectations of the project.

Students are also permitted to travel on their own before or after the three weeks during Phase Two. Students are always responsible for expenses incurred during personal travel or sightseeing (airfare, accommodation, entry visas, museum tickets, cultural event tickets, tours, train travel, etc.).

**ROLES AND RESPONSIBILITIES**

**Team Advisor**

Each TGC project team is assigned a Team Advisor for the entire 11-13 week period. Team Advisors typically accompany teams during Phase Two, meet regularly with the team, and participate in all conference calls and presentations. They evaluate team and individual performance to assign students’ grades.

Team Advisors also assist in resolving major issues, maintaining a good client relationship, and keeping the project on track within both the work plan, time-frame, and budget.
Team Advisors do not manage, direct, or lead the team, nor do they do the work. They are available, however, to help the team maximize its resources, acting as a means of advice, guidance, and support throughout the 11-13 week engagement.

Client

While every client relationship is different, clients are expected to provide access to key client people and information via a point-person. The client point-person typically remains in regular contact with the TGC project team for the entire 11-13 week period. The client point-person may be, but is often not the project sponsor.

If the client is physically located in-country, they often provide advice/support with on-the-ground logistics throughout Phase Two. There are instances where clients have no presence whatsoever in-country, and therefore, may not be able to assist.

TGC Program Office

The TGC Program Office is the primary contact with the client prior to Phase One, and is responsible for obtaining client commitment; determining initial project scope and project location; and providing teams with a list of client contacts. If a client has previously collaborated on a TGC project, the TGC Program Office can provide the reports and any relevant collateral material, for background and insight.

Following the formation of a project team, the TGC Program Office supports students with logistical items such as flights, accommodation, per diem allowances, entry visas, meeting rooms, conference calls, etc.

Following Phase Two, the TGC Program Office will assist with expense report processing and will handle client reimbursement.

PROJECT RESOURCES

The TGC Program Office will help support projects teams, but encourages the use of all other available Tuck resources, including Feldberg library, Tuck and Dartmouth professors, as well as Tuck alumni.

Technology

A laptop is required for Phase Two, and Tuck Computing will provide tips and advice, as support may be limited while traveling. The TGC Program Office will remind students, but encourages students to be proactive in understanding and utilizing Tuck Computing as a resource.

Contact information: tuck.computing@tuck.dartmouth.edu or +1 (603) 646-1818

Translators and Interpreters
In countries where the language of business is not English, a translator/interpreter may be required for in-depth interviews. It is the team’s responsibility to procure translators/interpreters, with advice from the TGC Program Office. Utilizing local business schools for translators/interpreters has been a successful model on past projects. Team members who are fluent in the country’s language are not expected to serve as interpreters.

**PROJECT EXPENSES AND LOGISTICS**

TGC is client-funded, with clients paying a program fee of $15,000 to help offset Tuck’s operating costs, plus all project-related expenses (airfare, accommodation, per diem allowances, etc.) for the student team and Team Advisor. Project-related expenses vary, depending on team size, the extent of in-country travel, and the budget agreed upon with the TGC program office. These costs typically range between $25,000 and $50,000.

All TGC project expenses and logistics adhere to Dartmouth College travel policies and are billed to clients for reimbursement. A recap of many policies is below. It is intended to be informative, but is not inclusive. Please read the Business Expense Reimbursement Policies in order to have a full understanding of reimbursable expenses and travel expectations:


The TGC Program Office will pre-pay as many expenses as possible. Expenses that the TGC Program Office cannot cover due to in-country customs or laws are the responsibility of the student or the Team Advisor (to eventually be reimbursed). There is no TGC/Tuck credit card that teams can use while traveling in-country, therefore students should anticipate credit needs of up to $1,000. If this is a hardship, students should discuss their needs with the TGC Program Office in advance of travel.

Students should determine a personal budget, taking into consideration personal preferences and the destination country. In general, students usually bring or have access to about $1,000 in spending money to cover personal and project expenses, over and above the aforementioned per diem allowance. Students frequently bring a combination of local currency, US traveler’s checks, and credit and/or debit cards. This varies by country and location within the country (urban vs. rural, one location vs. frequent traveling, etc.).

**Entry Visas**

Visa entry requirements can vary greatly from one country to another, depending on the applicant’s nationality. While the TGC Program Office uses a visa service to expedite visa applications for students, the process can be highly uncertain, and there is always the possibility of delay. We will work to assist students throughout the process, but it is ultimately the student’s responsibility to acquire the necessary entry visas, especially when in-person visits to embassies/consulates are required.

Please ensure the following to help mitigate problems or delays in visa processing:
• A valid passport is required for TGC participation, and must be valid for six months after the end of Phase Two. Any required passport renewals, replacements, or additional passport pages are the financial responsibility of the student.
• Ensure that there are at least two, blank, facing pages available in the passport to accommodate a visa.
• Get acquainted with all visa requirements. For US passport holders, visa entry requirements are available online (traveldocument.com). For non-US passport holders, please check the embassy/visa website for specifics.
• Fill out the required visa application forms.
• Provide the original passport and required number of passport photos.
• Prepare/request any other required supporting documentation.
• Flights cannot be confirmed until after the entry visa has been received, unless the TGC Program Office makes an exception, in writing.

There are often challenges involved in procuring visas, depending on student nationality and/or country of destination. The TGC Program Office does its best to communicate and support to mitigate any potential challenges. However, in some cases, visa expeditors cannot assist with visa procurement, and therefore, students must present their applications in person at the designated embassy or consulate. This may require the student to travel to Boston or New York City.

Non-US passport holders should be in contact with Dartmouth’s Office of Visa and Immigration Services to ensure the validity of their US visa for re-entry after TGC travel. Ensure that they have an updated signature on your I-20 prior to TGC travel.

Please note procuring entry visas for TGC travel always take precedence over procuring entry visas for personal travel, and that students are responsible for all costs associated with procuring a entry visas for personal travel. If it is necessary to expedite an entry visa for TGC travel purposes and, as a result, to expedite a visa for personal travel, students are responsible for all costs (visa, expediting service, mailing, etc.) associated with obtaining the personal visa.

**Per Diem Allowances**

Students will receive a per diem check, before departure, to be used for meals and incidentals. Per diems amounts for TGC projects will vary, as they are venue dependent. TGC uses the US Department of State per diem rates, as a guide, to determine the rate for a given venue.

If for any reason a student is delayed to arriving to the in-country venue, or leaves the engagement prior to the end of the in-country phase, the student is responsible for returning the unused portion of his/her per diem.

Please refer to the Dartmouth College’s *Business Expense Reimbursement Policies* for more details:

Airfare

Once a project team is fully staffed, flight booking instructions are sent out. TGC participants Students must use the Dartmouth College’s approved travel provider, Travel Leaders, when booking project-related flights. Students who make their own flight arrangements will not be reimbursed.

Flights are non-refundable, non-transferable, and any changes (and associated fees) to a booked flight itinerary are the student’s responsibility.

Accommodation

Client budgets dictate accommodation arrangements and students can expect double occupancy (i.e., sharing a room with another team member). However, there may be instances on TGC project teams where accommodation is single occupancy (i.e, each team member has his/her own room).

The TGC Program Office handles the booking of accommodation (for Phase Two) during Phase One. Where possible, accommodation is pre-paid, but students should be prepared to provide a personal credit card at check-in for incidental expenditures (room service, laundry, mini-bar, telephone, etc.). We strive to always place teams in clean, secure, and reasonably priced accommodation, preferably with access to business facilities. However, some clients determine the accommodation, often in accordance with their policies (proximity, corporate rates, etc.). While TGC makes every effort to arrange accommodation with certain amenities (wi-fi, restaurant, gym facilities, etc.), we cannot make any guarantees.

In situations where needs or practicality dictate, the responsibility for organizing and paying for accommodations may also be delegated to the Team Advisor (and sometimes the student team members). Specific budget parameters are provided in these cases, and must be met.

Immunizations and Prescriptions

All students participating in the TGC program, who wish to receive immunizations or prescriptions, must use the services of Dick’s House (Dartmouth College Health Services). TGC cannot guarantee reimbursement of any immunizations or prescriptions cost if a student chooses not to go through Dick’s House.

If/when you are selected to participate on a TGC project, you will be informed to schedule an appointment at Dick’s House, by calling the office directly (+1-603-646-9401), to set up a travel consultation. You will be instructed to bring along a copy of your immunization record to the initial appointment; your immunization record should be with you while traveling.

The cost of medical services rendered by Dick’s House is initially charged to the student’s tuition account, and will be credited later by the TGC Program Office, if the services qualify.
Students must submit those charges to their insurance first; the TGC office will cover any overages. However, only those immunizations or prescriptions deemed “required” by Dick’s House would be covered by TGC, as TGC does not cover immunizations or prescriptions that are categorized as “recommended”.

Gifts for Clients

The TGC office will provide teams with small gifts for clients or specify a budget amount to be used at TuckStuff using the TGC chart string in advance of travel only. Anything outside of these parameters cannot be covered.

Project-Related Expenses and Expense Reimbursement Forms

Students should expect to pay for some project-related expenses prior to, and during, international travel. Expenses eligible for reimbursement at the conclusion of Phase Two include:

- Reasonable travel to and from the airport, both in the US and internationally. Within the US, TGC will only reimburse up to a total amount of a round-trip Dartmouth Coach ticket from Hanover to Logan ($60). For those students not using Dartmouth Coach, other forms of car service or mileage are reimbursable, but only up to the $60 cap.
- Passport photos or other expenses associated with obtaining an entry visa
- Project-related travel while in-country (airfare and accommodation)
- Industry reports, white papers, etc.
- Translation and interpretation services
- Project-related telephone calls, faxes, internet, etc.
- Food/beverage costs for interviewees; student’s own food/beverage are not eligible as that is covered by the per diem allowance
- Reasonable foreign transaction fees through credit and debit cards; ATM withdrawals for use of per diem will not be covered, whereas withdrawals for project-related expenses will be eligible
- Reasonable baggage fees; excess baggage will not be covered unless cleared by the TGC program office, for example, needing an extra checked bag to bring gifts
- Gifts for interviewees will be considered for reimbursement if the client approves and/or if gifts are culturally expected/deemed necessary to facilitate interviews, etc. (check with your Team Advisor or the TGC office if unsure before making any financial commitments).

For the above project-related expenses, original receipts are required, meaning that there will be no reimbursement without the receipt to support the expense.

Students will receive the TGC expense report form in order to keep track of project-related expenses. All TGC participants are required by Dartmouth College to complete the expense report after the travel portion of TGC, regardless of whether or not they incurred any additional project-related while traveling (in order to reconcile their per diem allowance), which includes:
• A completed copy of expense report form (which will be provided).
• All original receipts, in date order, to include the US dollar amount, numbered to match the expense report line.
• A copy of any relevant credit card, bank, or other financial statements.

Detailed instructions on how to fill out the form are provided by the TGC Program Office prior to travel.

SAFETY, SECURITY, AND HEALTH PROCEDURES

All TGC participants must attend a Safety and Security briefing before Phase 2 travel, as well as complete two safety forms.

Travel to countries under US State Department warnings

There are instances where TGC projects involve travel to countries under a US State Department Travel Warning. The TGC program office constantly monitors and evaluates the situation to determine whether or not it is safe and feasible to send a TGC team. Those projects, that are determined to take place in Travel Warning countries, will require its team members to sign a waiver.

Emergency Procedures

Prior to the start of the in-country portion of TGC, the TGC Program Office distributes a master document listing the contact information for all teams (client, students, Team Advisor, and hotels) to all TGC students, Team Advisors, and to the Tuck School. The TGC Program Office will forward this master document to students’ emergency contacts, but students are asked to also forward the contact document to their families and partners.

In the event of an emergency, students, Team Advisors, family members, Tuck partners, and others should immediately contact:

Dartmouth College Safety and Security (available 24 hours/day, 7 days/week):
Safety.and.security@dartmouth.edu or +1 (603) 646-2234

If an emergency occurs, Safety and Security will immediately notify the TGC Program Office, and Tuck will involve International SOS as necessary. See below for more information on International SOS. The TGC Program Office and Tuck will establish a “crisis response” team to establish communication within Tuck regarding the emergency and to initiate communication with the TGC team, TGC family members, and the Tuck School.

International SOS (www.internationalsos.com)

Dartmouth College’s Office of Integrated Risk Management and Insurance has contracted International SOS to provide worldwide emergency assistance for all Dartmouth College students and staff. Services range from telephone advice and referrals to full-scale evacuation
by private air ambulance. The required ISOS member login is the same as the Dartmouth College membership number (11BSGC000018). The International SOS website also contains an online Personal Locator form for inputting travel and destination information.

The TGC Program Office requires that all students to complete the form so that this information is immediately available to International SOS in the event of a crisis or emergency.

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<th>International SOS 24-Hour Alarm Centers</th>
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<td>Available 24 hours/day, 7 days/week</td>
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<td><a href="http://www.internationalsos.com">www.internationalsos.com</a></td>
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</table>

Dartmouth College membership number: 11BSGC000018

Philadelphia, PA (If calling from the USA, Mexico, Central, or South America)
+1 (215) 942-8226 (call collect where available)
1-800-523-6586 (within the USA)
1-800-441-4767 (calling from Canada)

London, England (If calling from Europe, CIS, Africa, or Middle East)
+44 20-8762-8008 (call collect when available)

Singapore (If calling from Asia, Australia, or the Pacific Rim)
+65 6338-7800 (call collect when available)

Note that while International SOS offers students advice and services that many health insurance companies do not offer, International SOS is not health insurance.

Requests for reimbursement for medical care received while abroad should be submitted to a student’s health insurance provider (usually the Dartmouth College Student Group health insurance plan).