

# Learn by Going: Critical Issues for Faculty-Led Study-Abroad Programs

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## **Abstract**

In an increasingly globalized world, a study abroad experience provides students with the opportunity to learn about the world and critical global issues first-hand. It is “learn by going.” A faculty-led program is a special form of study abroad where faculty create programs for their students and accompany them abroad as teachers and trip leaders. It provides a safe, structured, supervised, convenient, academically rigorous, and cost-effective way for students and faculty to go abroad and obtain the benefits of an international experience. However, a faculty-led program is more complex, more demanding, and entails more responsibility than one might expect. The purpose of this paper is to identify the larger process and the critical issues involved in creating and carrying out a successful faculty-led program. The perspectives and roles of faculty and staff are emphasized. It provides insights, lessons learned, and recommendations based on the authors’ practical experience and accumulated knowledge gained over twenty-five years of involvement with study abroad. The content draws on Cal Poly’s faculty-led programs in six countries, but it is broadly applicable because the issues and actors are similar across campuses.

## **Introduction**

IN AN INCREASINGLY GLOBALIZED and interconnected world, a study abroad experience is a vital part of a university education. The benefits of studying abroad include developing global awareness and cross-cultural competence, more effective language learning, resume building, and better preparation for graduate school (Anderson *et al.* 2006, Llanes and Muñoz 2009, Michigan State University 2011, and Norris and Gillespie 2008). The focus of this paper is on one type of study abroad program, specifically the faculty-led program. A faculty-led program is an academic term abroad that is developed by faculty from a university for students from that university. The faculty accompany students to another country, teach courses while

on the program, and act as trip leaders. A faculty-led program provides a unique opportunity for students to step outside the classroom and learn about the world firsthand, and for faculty to teach and mentor their students through a critical-learning and life-changing experience.

Faculty who are new to faculty-led programs may not have a full understanding of the many aspects and complexities involved in creating, administering, and leading a program. “Developing a faculty-led study abroad program is more demanding than, and involves a great deal more responsibility than, planning and developing on-campus courses” (Texas State University 2007:4). While abroad, faculty take on many roles, including teacher, manager, tour guide, mentor, friend, and others. There are multiple academic, administrative, and logistical considerations that need to be taken into account. A faculty member cannot take students abroad without approval, and without addressing issues such as health and safety, budgets, and contracts. The purpose of this paper is to help faculty gain a fuller understanding of the process, roles, and responsibilities involved in creating a successful faculty-led program.

The definition of a faculty-led program puts the faculty at the center of a program. However, in practice there is a significant role for university staff. The day-to-day management of a program involves many administrative tasks, which take time. Someone must also ensure that the program is in compliance with university policies and procedures. As a faculty member, it is very difficult to know everything and to do it all alone. Running a faculty-led program is more likely to be a faculty-staff partnership, where staff play a central role. However, many faculty view staff (and administration in general) as an obstacle to taking students abroad, or simply as an annoyance. Therefore, a goal of this paper is also to help faculty understand the vital role that staff play in successful and sustainable faculty-led programs and the need to work cooperatively toward these ends.

The authors bring the perspectives of both faculty and staff to this study. The first author is a geographer who has accompanied students ten times to four countries (Mexico, Peru, Cuba, and Spain). The second author is a staff member and the supervisor of Faculty-Led Programs in the study abroad office at Cal Poly. Her office coordinates programs to six destinations (Australia, Costa Rica, London, Peru, Spain, and Thailand). Both authors have extensive experience with

every aspect of faculty-led programs, including going as students, teaching on them, creating new programs, and administering them. This paper addresses most of the components of a program, but it is not explicitly intended to be a handbook or a detailed how-to guide to faculty-led programs. It offers insights, lessons learned, and recommendations based on the authors' practical experience and accumulated knowledge gained over twenty-five years of involvement with study abroad. The information presented below draws heavily on the experience of Cal Poly's faculty-led programs, but it is broadly applicable because most of the issues and actors are similar across university campuses.

## **Faculty-Led Programs: Need and Benefits**

For this paper, a faculty-led program is defined as a credit-granting college-level study abroad program where faculty accompany students from their university as teachers and trip leaders. They offer regular catalog courses but teach them in another country. These programs are created by the home university, administered in-house, and intended for the students from that campus. This is not a travel program or about attending a conference or a contest or performance. It is an academic term abroad (i.e., summer, quarter, or semester). A faculty-led program is further distinguished from an affiliated program, which also employs faculty to teach abroad but is run by private or nonprofit companies, administered off campus, and enrolls students from many schools.

Cal Poly has three types of faculty-led programs, classified by where they are housed and by who initiates, controls, and administers them. There are university-level programs that are housed in and administered by the study abroad office on campus. There are department-level programs that are housed in an academic department and administered by the faculty and staff within that department. Cal Poly also has course-level extended field trips that are initiated and administered by a specific faculty member and tied to a course. However, in all cases the study abroad office has a role in ensuring that every program complies with university policies. A faculty-led program can be annual, biannual, periodic, or one-time. Programs that are offered on a regular basis usually go during the same term (i.e., fall, spring, or summer) each year. Within the larger umbrella of programs, some may focus on general education courses, thus appealing to all students on campus. Others may focus on language courses or target a specific major or specialization.

Academically, the best place to learn about the world is to go there. Cal Poly has an applied approach to learning that is reflected in its motto, “Learn by doing.” Study abroad is “Learn by going” (Zueschner 2011). Participation in a study abroad program is one of the most effective ways to globalize education (Anderson *et al.* 2006). Students gain a global perspective as they learn first-hand about critical global issues and other countries and cultures. Also, by leaving the U.S. and viewing it from afar, Americans see their own country, culture, and foreign policy with greater objectivity and perspective. For language acquisition, studying abroad is clearly the best way to learn a second language (Llanes and Muñoz 2009). Personal growth is another important benefit of studying abroad. Adapting to life in another country is challenging, and students come back more mature and well-rounded. A study abroad program looks good on a résumé and can expand a graduate’s career possibilities (Norris and Gillespie 2008). Study abroad is also fun and brings a sense of adventure. Students consistently state that their study abroad experience was the most important part of their university education (Washington State University 2006). The world opens up to them, and their lives are forever changed.

There are benefits to students that are specific to a faculty-led program. Faculty are available to provide on-the-ground assistance any time, day and night. The curriculum is seamless, and students earn resident credit. University-operated programs are almost always cheaper than the external affiliated programs. Plus, financial aid and scholarships apply. Parents, especially those of female students, feel safer sending their children on a university-organized and -supervised program. They are going with someone from the university. Faculty-led programs are convenient for students because they are in-house programs with staff support. Everything is pre-planned at their university in accordance with the academic, administrative, and logistical requirements of that university. Courses, excursions, housing, transport, and food are included in an integrated package. Students just have to pay, register, and go. While these programs have been criticized for dumbing down study abroad and having limited cultural immersion (see Lewis 2009: xiv), our experience at Cal Poly suggests that even introductory, short-term programs lasting four weeks have a dramatic and life-altering impact on students’ perceptions of the world and their place in it.

The faculty themselves have a lot to gain from participation in a faculty-led program (Hulstrand 2009). Teaching abroad makes

them more competent teachers. They come back with new ideas, material, and real-world perspectives that they can integrate into the classroom. Faculty gain legitimacy in the eyes of the students because they have “been there.” Teaching abroad can also support faculty research and intellectual growth. It is important to emphasize that faculty are busy teaching and working as trip leaders while on a program. However, time in the field can generate ideas for research, and reading and writing can be done during free time. It is also possible to structure coursework where students are involved in data gathering. Faculty participation in study abroad can help in the tenure and promotion process. It supports teaching and research, and creating and administering a faculty-led program involves service to a department or university. In addition, teaching abroad invigorates and reenergizes faculty. The students are more enthusiastic and engaged. Faculty get to know them better, and it is professionally and personally rewarding to be a part of guiding the students through a transformational and life-changing experience. Finally, faculty can receive extra salary if they teach on a summer program, and in many cases they take their families with them.

### **Choosing a Location: Place Matters**

Study abroad is a form of educational tourism, as it involves travel with a group to another place for the purpose of engaging in learning activities (Bhuiyana et al. 2010). The location or destination is critical to the success of a faculty-led program. It is important to choose a place, country, and region of the world where students want to go. Apart from the academic rationale, three factors are critical to site selection. They are safety, attractiveness of the place, and accessibility (Keese 2011). Safety—or, more accurately, the perception of safety—is first and foremost. Students will not go to places where they do not feel safe. Even if they want to go, their parents may not pay to send them if they perceive the location to be unsafe for their children. (Cal Poly suspended its Mexico programs because it cannot send students to countries that are on the U.S. State Department travel warning list.) The second factor is attractiveness of place. Appealing places with an “exotic” image will attract more students. It is difficult to recruit students to go to places that are unattractive, unknown, and lack interesting things to do during the program. While the academic program is central to the mission of study abroad, students are also thinking about travel and adventure. Only programs that enroll sufficient student numbers will be viable over the long term. Finally, the study site

must be accessible. Places that are too far away, lack major airports, or are too expensive to get to will attract fewer students. They want to get off the beaten path, but at the same time they need to feel safe, connected, and comfortable.

A study site is usually chosen because a faculty member is passionate about it and has personal experience there. This passion for place is an important factor in the success and sustainability of a program. It drives faculty and others to work hard to make the program happen and to sell it to others. However, that place must still have a broad appeal to the target student group if the program is to be successful over time. Just because one faculty member wants to go somewhere does not mean that sufficient numbers of students will want to go there. Cal Poly's faculty-led study sites are chosen with multiple criteria in mind. We look for places where we can have a strong academic program, but ones that are also interesting and fun to visit. Above all, they have to market well. Peru was chosen over other South American countries because of its desirability as a destination. While it is a great place to study Spanish and learn about Latin America and the many global issues that play out there, the program is marketed emphasizing the study site (colonial Cuzco), and the excursions to the nearby Sacred Valley of the Incas, Machu Picchu, Lake Titicaca, and the Peruvian Amazon. Thailand was chosen for the mystique of its natural beauty, eastern culture, hospitable people, amazing food, ruins of ancient kingdoms, and low cost. However, once there, Thailand is an excellent location to learn about the emerging Pacific Rim region and its importance to the world economy. London was chosen because it is the leading student travel destination, it is English speaking, and it is a fun place to go. However, as a world city, London has an unparalleled mix of history, architecture, theater, art, and global economic and political reach, making it a living laboratory for a strong academic program. London also appeals to faculty and students from a variety of disciplines, which facilitates student and faculty recruitment.

## **Committed Faculty**

As the name indicates, the faculty are central to faculty-led programs. They accompany the students on the program. A faculty member is the go-to-person while in another country. Leading a faculty-led program is hard work. It is not a vacation or a personal research trip. It is a full-time job. A high level of commitment on the part of the faculty is required in order to have a successful program. Faculty assume multiple roles and must have active involvement in all aspects

of the program. The first and most obvious role is that of a teacher. The coursework provides the foundation for the academic program and the learning that occurs while studying abroad. However, faculty are not just teachers. They also play an important role as trip leaders or managers. When multiple faculty go on a program, one is usually designated as the trip leader or resident director. Faculty play a liaison role. They act as the link between the university and the service provider (a third-party organization with which a university contracts to make on-site arrangements). The faculty is the university's representative on the ground to ensure that the program is receiving good service. It is important to build and maintain good relationships with the service provider because the university wants good service. Another faculty role is that of mentoring students. For many of the students, it will be their first time travelling outside the U.S., which can be a transformational experience. Faculty help guide students through an awakening as the world opens up to them. Faculty play the role of counselor. Some students experience culture shock, homesickness, attachment, and/or mental health issues. Others will have disciplinary problems such as alcohol abuse, drug use, or cheating. In consultation with the appropriate offices or services at the home campus, faculty may need to address these issues with the students. As the trip leader, the faculty is the campus' representative on the ground, thus taking on the role of administrator. Faculty may have to work with department chairs, deans, campus staff, and upper-level administrators, as the circumstances require.

Before the program begins, faculty play a critical role as promoters of the program. There will be no program unless it is marketed and students are recruited. Faculty must be actively engaged in this process. Faculty should be giving presentations, distributing marketing materials, and communicating with colleagues and students. They cannot rely on department or study abroad office staff to do this entirely for them. Faculty play a role as student advisors. Students will come to them with a range of questions about the coursework and the program in general. Faculty need to be well-versed in all aspects of the program and help the students with pre-program planning and decision-making. The faculty's role does not end with the program. They must reconcile accounts, submit grades, write a post-program report, help market for the upcoming year, and mentor new faculty who are interested in the program. In the end, the faculty role is the most important role in a faculty-led program. They have a hand in everything. Faculty do a lot of work up front and behind the scenes that the students may not see, understand, or appreciate

to keep the program running smoothly. They are constantly shaping the content of the program, its image, and the student experience.

## **The Coursework**

On a faculty-led program, students are taking courses for academic credit. The courses are the regular catalog courses that are offered at the home university, except they are being taught abroad. Cal Poly students take Cal Poly courses with Cal Poly professors, but in another country. The benefits are that students register in the same way, they receive resident credit, financial aid applies, and the courses meet the same degree requirements as if they were taken on campus. There are no transcript, articulation, substitution, or delay issues. Deciding which courses to offer has important consequences for the nature and success of a program. Faculty must offer courses that students need and want to take. Without student numbers, there is no program. Courses should be interesting and relevant to the country and region where they are being taught. In order to teach appropriate courses, faculty will need expertise in the place. However, just because a faculty member is enthusiastic about a course, does not mean that the students will want to take it. Faculty must be flexible and adapt to the needs of the program.

The kinds of courses that are offered will have an important impact on a program's focus, learning outcomes, student numbers, faculty participation, and overall sustainability. Coursework types include general education, language, major- or department-specific, and/or service learning. If the goal is to create a program with long-term staying power, general education courses have the broadest appeal. GE courses attract students from across the university, as well as faculty from many departments who can teach those courses and who have expertise in a particular country or region. Upper-division GE courses are preferred because they are needed by far more students who are likely to be interested in a faculty-led program. Most juniors and seniors have already completed their lower division GE requirements. All of Cal Poly's faculty-led programs (except one) offer Humanities 310: World Cultures, which is a sub-titled, upper-division GE course with location-specific content (e.g., HUM 310: Culture of Spain; HUM 310: Culture of Southeast Asia; HUM 310: Culture of Latin America).

The second type of coursework includes language courses. Spanish courses are central to Cal Poly's programs in Mexico, Peru, and Spain. Cal Poly uses a service provider or host school to provide the



language courses. Students enroll in Cal Poly Spanish courses, but they are taught by local teachers employed by the host school. Cal Poly faculty and staff work with the host schools on course content, academic standards, and grade reporting. Spanish language courses are taught alongside the courses taught by Cal Poly faculty, which are taught in English. Language and culture programs are a common study-abroad model. Language, especially Spanish, can be a very big draw and a marketing tool. However, it is also necessary to have programs where language is not the focus. Programs that do not include language allow access to more countries and provide options to students with different majors and interests. Some students do not want to study language. Some languages are too difficult to learn, are less globally relevant, or are not taught on the home campus. Cal Poly's program in Thailand is a good example. Thailand is a very popular student destination, but few if any students want to study the Thai language. All courses are taught in English. Students learn a few pleasantries in Thai, but it is a cultural enrichment element in the GE course, not formal language learning. The Cal Poly in London program is also popular because the United Kingdom is an English-speaking country.

Coursework can be department- or discipline-specific. Faculty can teach courses and take students from within their own discipline. At Cal Poly, the architecture, landscape architecture, and wine-and-viticulture departments participate in major-specific programs. These programs can be sustainable year after year, but departments must commit to sending faculty, and those departments and faculty have a greater responsibility for recruiting their students. Cal Poly's Australia program is a hybrid. Two faculty participate. One is an agricultural sciences professor who teaches wine-and-viticulture courses, while the other teaches general-education courses. Each type of student can take two in his/her focus area and one in the other. Taking a GE course allows major-specific students to learn more about the culture of the place in which they are studying. The GE students take a course on wine that relates to the Adelaide area and is interesting to non-majors. Hybrid programs can be mutually beneficial to major and GE students and broaden the appeal of the program.

The final type of coursework incorporates service learning or community-based volunteer opportunities, which is a trend on many university campuses (Rubin 2009). Cal Poly has an office on campus to promote the integration of service learning into coursework. Integrating volunteer work into the faculty-led structure provides a

hands-on element to a course. It connects students with people and communities and allows for another level of immersion. By doing volunteer work and processing the experience as a group, students can develop a deeper understating of the issues addressed in a course. Cal Poly has a “learn by doing” motto, and its programs in Peru and Thailand integrate service-learning components. In recent years, a number of course-level extended field trips at Cal Poly have been based on service learning. It is important to note that doing service learning abroad usually requires the help of a third-party service provider to make contacts and arrangements.

It is important to distinguish a faculty-led program from a field trip, a travel trip, or a vacation. Students are taking courses for academic credit while abroad. Faculty and staff need to emphasize to students from the beginning that they are participating in a serious academic program. Academic rigor is, and should be, central to the mission of study abroad. Students need to go into the program with the mindset that they are there to attend classes and study. Academic rigor should be used as a selling point. Students learn more in a structured program that has coursework than they do when just traveling or backpacking. They are more immersed, engaged, and aware; do more processing; and experience more personal growth. Study abroad has long struggled with the image that students do a lot of partying and very little studying (Lewis 2009: xv). The faculty are ultimately responsible for maintaining academic rigor. A program can be serious academically and still be fun.

While faculty-led courses have the same prefix and name as those being taught on the home campus, in practice, faculty need to adapt their courses to fit the place, learning environment, program structure, and demands of living abroad. Courses should relate to the site. This is part of the academic reason for being there. Ultimately, the course will not be exactly the same as the one taught in the classroom at home. At home, students may attend class for three or four hours a week. While abroad, they can live it all day, every day, seven days a week. There is more experiential learning. A study-abroad course needs to balance classroom time with getting out and learning about the place by experiencing it. Assignments can involve interviews, observations, photo essays, and reflection papers, thus reflecting what the students are experiencing. Field trips, museum tours, and other excursions, especially if they are guided or include lectures, can be counted as class or laboratory time.

While studying abroad, the students will have less time and energy for homework and reading. Students have demanding schedules and face many challenges, including learning a language, adapting to a new culture, living with strangers, navigating public transportation, and others. All of this can be stressful and extremely tiring, both physically and mentally. The amount of work that is required should reflect this reality. This does not mean that the courses are less rigorous or that the students are learning less. They are actually learning more, but in different ways. With a demanding schedule, students will also need some carefully scheduled free time to explore the place on their own, reflect, relax, and have fun. If faculty overload the students, they will either not do the work or resent it, and it can detract from the overall experience.

### **Good Third-Party Service Provider**

Having a good service provider is critical to the success of a faculty-led program. A service provider is a third-party organization with which the university contracts to make on-site arrangements. These are the people in the other country who provide facilities, language instruction, service projects, housing, field trips, transportation, and other support services. Service provider staff know the language, culture, and laws of a country. They know the rules of the game on the ground and how to get things done. This is especially important when there is an emergency. Local staff are there to help if a student gets sick or injured, when there is political strife, or if there is a natural disaster.

The service provider is invested in your having a successful program. It is their business, and they want you to come back. Without a service provider, a program will be much more faculty- and staff-intensive. The faculty will have to know and manage every program detail, as well as stay on top of any changes that occur in a country. It can be riskier to run a program without a service provider. With a good service provider, the university can also send new faculty with the assurance that there will be someone there to help them. Furthermore, faculty and staff may change at home, but having a service provider gives continuity and helps make the program sustainable on the international side.

Several types of organizations can act as service providers, including a university, a private language school, an NGO, or a travel agent. Cal Poly uses universities in Australia (University of Adelaide), Thailand (Chiang Mai University and Suan Sunandha Rajabhat Geographic Education

University), and Spain (University of Valladolid) as service providers. Cal Poly works with private Spanish-language schools in Mexico (Cuauhnáhuac Spanish Language School in Cuernavaca and Olé Center for Language and Culture in Querétaro) and in Peru (Centro Bartolomé de Las Casas). These schools do more than just give the language classes. Most have the capacity to arrange all elements of a program. Cal Poly contracts with NGOs for its summer programs in Peru (ProWorld) and London (Foundation for International Education). ProWorld is a U.S.-based NGO, so contractual arrangements are simpler. However, Cal Poly also successfully works with many non U.S.-based organizations. A travel agent can act as a service provider. In Peru, Cal Poly contracts with SAS Travel for excursions to Machu Picchu and Lake Titicaca, and with Mondo Verde Expeditions for its Amazon excursion. In Spain, European Discoveries provides guided excursions in and around Madrid. In practice, most Cal Poly programs have multiple service providers. Faculty and staff who manage faculty-led programs need to be good coordinators in order to deal with the multiple and complex elements that go together to make up a program. If you do work with a service provider, you must address the contract issue with your university.

## **Support from Staff and Administration**

The day-to-day management of a faculty-led program involves many tasks and requires time. Someone has to recruit students, process applications, collect fees, check academic eligibility, get students registered, and deal with insurance, budgets, contracts, and service providers. Who is doing all this work? Who creates, collects, and stores the paperwork? These are staffing questions. As a faculty member, it is very difficult to do everything alone. The management and coordination of a faculty-led program ultimately requires collaboration between faculty, the service provider, and on-campus staff and/or the study-abroad office. Staff plays a critical role in a faculty-led program, whether directly or indirectly. Many faculty view staff as getting in the way, and sometimes treat them as inferior. In practice, faculty need to establish a good working relationship with staff if they expect to have a successful and smooth-running program.

Staff support is also important to the continuity and long-term sustainability of a program. Sustainable programs cannot rely on one faculty member. What happens when that person is gone? People retire, become ill, and sometimes pass away unexpectedly. If one person has all the knowledge about the program and is doing

most of the work, then the program ends with the person. Having departmental staff or the study abroad office involved can help a program to have a longer institutional life. This does, however, raise issues of responsibility and ownership. Does the program belong to a faculty member, a department, or a study-abroad office? Where is it housed, who administers it, and how is the workload divided up?

A faculty-led program also needs support from administration. The creation of a program will require department, dean, and provost approval. Administration needs to be on board early in the process. For faculty, your department chair and dean will need to sign off on course offerings, minimum enrollment numbers, and release time away from campus, as well as address potential salary, benefit, and funding questions. There is also a political element that shapes the context in which study-abroad programs operate. Does upper-level administration view the concept of study abroad as critical to the university's mission? Is it included in the strategic plan? Study abroad produces more qualified students, makes faculty better teachers and scholars, globalizes the curriculum, and can enhance the reputation of the university. Faculty and staff should take advantage of every opportunity to make known how faculty-led programs benefit the university and its objectives. Faculty may not fully appreciate the larger institutional or political element of study abroad. One should not, however, view administration as a hindrance. On the one hand, you need their sign-off. On the other, you want their buy-in on the larger university mission. In the end, study abroad is a collaborative enterprise. Faculty must be flexible and have the ability to work with people across campus.

## **Proposal and Compliance Issues**

All university programs require some kind of proposal. There are two main reasons for this. First, from a practical perspective, writing a proposal forces you to have a plan, to think through what you want to do, and to have other people review it and give you feedback. Second, taking students off campus, especially to another country, involves serious academic, administrative, and liability issues. Submitting a proposal initiates a process that will lead to proper review and approval. A proposal does not have to be long, but it should have clear information about the major components of the program. This may include program-specific and university objectives, the academic program, the study site, excursions, housing, transportation, the itinerary, the service provider, a budget, and

roles and responsibilities of those involved in the program. Writing a proposal may seem like another hoop to jump through, but it is in the best interest of the faculty and the university to do this. In the end, it will make for a better program.

When taking students abroad, there are a number of legal and policy requirements that faculty and departments may not be aware of (O'Rourke and Iammarino 2010). At Cal Poly, faculty-led programs must be in compliance with university and system-wide policies on liability, health, safety, contracts, and budgets. Faculty and the study-abroad office work with a core group of offices on campus that are informally referred to as the administrative trilogy. The risk-management office has several requirements. Students must sign an assumption-of-risk and release form, which protects the faculty, staff, and university from legal liability. A medical information and authorization form allows Cal Poly's on-site faculty to consent for medical treatment if the student is unable to make the decision. The California State University (CSU) system requires students to be covered by a travel medical insurance policy, which should be included in the budget and the student program fee. Every program is also registered with the U.S. State Department, and emergency contact information is provided to the campus police department, which can receive and direct calls twenty-four hours a day. Faculty are required to complete online emergency-preparedness training, and the study-abroad office has created a crisis-response plan to educate faculty and on-site coordinators on how to deal with a crisis ranging from natural disasters to political upheaval to individual students having medical or mental-health emergencies. The university also has a crisis-response team with representatives from across campus that can be mobilized if needed in an emergency situation. In short, the campus needs to know where you going, what you are doing, how to contact you, and what to do in case of an emergency.

At Cal Poly, the budget office must review and approve a program budget. If a program is collecting fees from students, there has to be an agreement to indicate how funds are collected and spent. A detailed budget is submitted to the campus fee-advisory committee, and once approved, a campus account is created for a specific program. The university budget office examines these accounts periodically, and the CSU can audit them. The third office in the trilogy is contracts and procurement, which reviews and approves the agreement with the third-party service provider. The agreement defines the contractual obligations on the part of the service provider

and the university, the price, cancellation policy, and exchange rates. When creating a faculty-led program, it is necessary to get into contact with the appropriate offices, acquire or create the necessary documents, and get into compliance. Work on the compliance issues needs to begin six to twelve months before the program start date. This may seem like a daunting task and discourage many faculty from taking students abroad. However, at Cal Poly, the three offices mentioned above, along with the study-abroad office, advise faculty and departments on compliance issues, and many of the documents have already been created and are available online. Also, it really helps to have study-abroad office staff working on this. They work with these issues every day, and it is their job to know what to do.

## **Recruiting Students**

Marketing is critical to the success of a study-abroad program. The program can be amazing, but if the students do not know about it, it will not get the enrollment numbers. Furthermore, students have many study-abroad options to choose from, so the program needs to stand out in a highly competitive market. Marketing starts with proposing and creating a program that will market well. Promotional efforts need to be multidimensional. Cal Poly programs are marketed with websites; posters; flyers; brochures; sandwich boards; e-mail announcements to students, faculty, and departments; Facebook; study-abroad fairs on campus; brief classroom presentations; and longer informational meetings. The most important element in marketing is the forty-minute informational meeting. A lot of effort should be put into creating an effective PowerPoint presentation. The presentation needs to be concise (twenty minutes), visually dynamic, and highly engaging. It should emphasize the place and the experience. You want to grab the students' attention and move them emotionally. Include dramatic imagery of the place and of students in that place. Every slide needs a graphic. Animate all the slides, and insert short video clips if you have them. Keep the informational meeting simple. Give an outline of program components (e.g., a few facts about dates, location, courses, excursions, housing and meals, eligibility, cost, and financial aid) but do not get bogged down in details. The goal is to get the students excited about the place and the program and to encourage them to visualize themselves going there. We want to emphasize the importance of avoiding a long, detailed, and boring presentation. Leave most of the details for the website, individual advising in the office, and the pre-departure orientation meetings.

The program website is the second-most important marketing tool. The website needs to have a comprehensive, but still concise, presentation of all aspects of the program. Like the presentation, it also should be well illustrated and visually engaging. All the other marketing efforts should be designed to get students to view the website and, ultimately, to attend an informational meeting. While technology and social media are important marketing tools, students still rely on face-to-face interaction to help them make decisions about studying abroad. They will go to an informational meeting because they want to see an interesting and informative presentation, and they want to talk to real people who have answers to their questions. Very importantly, arrange to have students at the meeting who have been on the program. Students listen to their peers. You may only get one chance to sell the program. Make it count.

Faculty need to play a central role in marketing. Staff can help with marketing efforts, but do not count on them to do it all. As faculty, you are front and center in faculty-led programs. You have the knowledge and passion for the place and program, and you are the one going with the students. To a certain extent, you are selling yourself as someone they want to spend time with and learn from while abroad. Faculty need to distribute marketing materials, talk to as many students and colleagues as possible, and give a lot of brief classroom presentations. Prepare a three-minute PowerPoint presentation (with pictures) that identifies the program, points them to the website, and gives the date of the next informational meeting. Arrange with colleagues across campus, especially those who have large-section general-education classes, to allow you to give the brief presentation at the beginning of their classes. Marketing is a numbers game and depends on effort. If you visit a lot of classrooms, distribute a lot of materials, and talk to a lot of people, the program has a better chance of meeting enrollment targets.

## **Pre-Departure Orientation**

Approximately two months before departure, there needs to be one or two mandatory orientation meetings. It is better to have fewer meetings where participation is required than have many pre-departure meetings where attendance will likely be lower. Orientation meetings serve two functions. The first is informational. This is the time to pass on the details about the program. Students should receive information on topics such as the weather, the basics of packing, designated arrival time and location, itinerary, textbooks,



obtaining money, electrical current, among other things. A discussion about local customs, courtesy, and etiquette, and what it means to be a foreigner or guest in another country, is also appropriate. American students often behave with a sense of entitlement when abroad. In their mentoring role, faculty can help students be aware, flexible, and adaptable.

The second function of a pre-departure meeting is to pass on the essential university-mandated information. Students should receive information about health and safety, emergency contacts, academic policies, university alcohol and drug policies, insurance coverage, and general legal, risk, and liability issues. Faculty need to research university policies and sanctions for conduct violations, or create such policies and sanctions for the program if necessary. At Cal Poly, students sign a student-participation agreement that outlines expectations of behavior. For legal reasons, it is important that faculty and staff do not give medical advice. Students can be directed to resources where they can get information. The Center for Disease Control (CDC) website provides country-specific information on health, vaccines, food, and water. Students should consult with their health provider or the campus health center about vaccines. Some vaccines need to be received six to eight weeks prior to departure. This is why the first orientation meeting needs to be at least eight weeks before the start of the program. Students should also be directed to the U.S. State Department website for travel- and country-specific information, which includes sections on safety and crime for each country.

Keep in mind that since students are still at home, much of the information will seem abstract because they are not experiencing it. They will not comprehend everything and forget much of what is said. Plus, there will always be a small number of students who cannot attend an orientation, even if it is mandatory. The orientation material also needs to be put into a student handbook. In that way, students have been both told the critical information and received it in writing. Prior to the first meeting, the handbook should be sent by e-mail to participants and posted on the program website. Before the program begins, have students sign a form acknowledging that they received the handbook, read it, and agree to the material contained within it. In that way, they cannot claim they did not receive the essential program information. They are adults and need to be held accountable.

Given liability issues, the Cal Poly study-abroad office does not arrange group flights. Students are responsible for their own transportation and meet at the study site at a designated time and place. The program begins at that point. There are multiple benefits to this approach. Students can get their best deal and can use frequent flyer miles. They decide when to go and leave. Many students want to travel before or after the program. It requires less staff time to have students arrange their own transportation to the study site. While some students do arrive a few hours or a day late, they always get there. Faculty, university staff, and service-provider staff should have each student's transport/flight information so they can monitor their arrivals. Cal Poly staff sets up Facebook groups for all of its faculty-led programs so students can share information and travel together if they wish to make those arrangements.

Once students arrive at the destination, there needs to be an on-site orientation. This should be coordinated with the service provider, whose staff will give their take on the various program issues (e.g., health and safety, homestays, expected behavior, culture shock, staff support and contacts, what to do in emergencies, etc.). Once students are on-site, the information will be more meaningful because they are there and the program is really happening. They will be engaged and actually listening. Typically, on-site orientations also include a tour of facilities, a city tour, and instructions on how to get around and use public transportation.

## **Assessment**

In order to have a successful program and improve it over time, it is necessary to get feedback. All aspects of the program should be assessed, and all of the actors in the program need either to provide input or be evaluated. Student evaluations are critical to program assessment. They are your customers and will be your best (or worst) promoters, depending on their experience. Students should be asked to give feedback on the entire experience (faculty, courses, excursions, housing, the place, the service provider, staff/study-abroad office support, marketing, pre-departure planning, etc.). The students should evaluate the faculty role both as a teacher and as an on-site manager, which will help departments and study-abroad offices to determine whether they want to send particular faculty members again. We suggest that student evaluations be administered in written form on-site near the end of the program, and then brought

home in a sealed envelope. Evaluations that are administered electronically get less than a twenty-percent return at Cal Poly.

Program assessment should also include feedback from the faculty and from the service provider. Faculty feedback begins with weekly e-mail updates to the department or study-abroad office. The faculty should also submit a post-program report. The faculty report includes comments on the same topics that the students evaluate. However, this report will focus on the academic goals and on the organizational and logistical aspects of the program, including the service provider's level of service. The faculty report provides an on-the-ground, non-student perspective of the program. A report should also be solicited from the service provider. The service provider may have valuable insights into how the faculty performed, student participation and behavior, excursions, health and safety, and logistics, as well as how to improve the working relationship with the university. Finally, while the primary purpose of assessment is to improve the faculty-led program, the information gained would be useful in meeting more-general university-level assessment goals, should a department or study abroad office be required to submit such information.

## **Conclusions**

In an increasingly globalized, interconnected, and conflicted world, having a global perspective is more important than ever. A university study-abroad experience provides students with the opportunity to learn about the world and study critical global issues first-hand. It is "learn by going." A faculty-led program is a special form of study abroad where faculty create programs for their students and accompany them abroad as teachers and trip leaders. It provides a safe, structured, supervised, convenient, academically rigorous, and cost-effective way for students and faculty to go abroad and obtain the benefits of international experience. However, many faculty lack a full understanding of the complex nature of a study-abroad program. They cannot just get some students, go abroad, and do whatever they want. The purpose of this paper is to identify the larger process and the critical issues involved in creating and carrying out a successful faculty-led program. This paper provides an applied practitioners' perspective on faculty-led programs. The authors have been students, faculty, creators, and administrators of these programs.

The overriding theme of this paper is that a faculty-led program is more complex, more demanding, and entails more responsibility than one might expect. A program has multiple elements and the faculty must have the ability to address and manage all the pieces in a coherent and organized manner. A timeline of twelve to twenty-four months is required from the idea phase to program completion. The actual time spent going on the program is just one piece of a much larger process. We do not want to discourage faculty from pursuing their desire to take students abroad. What we have tried to do is pass on what we have learned through experience about the various steps in the process, in order to help others understand what it takes to create a successful program.

The term “faculty-led” implies that the faculty member is in charge of the program and does everything. In practice, however, a faculty-led program is a collaborative effort involving multiple actors. We refer to an organizational trilogy in which the key players are faculty, staff, and third-party service providers. Faculty cannot do everything alone. It is important to understand faculty-led programs from the staff or administrative perspective. A program is faculty-driven, but it is university-supported and -supervised. Faculty need to pay special attention to the compliance issues. These are the university-mandated legal and financial requirements related to risk management, budget, and contracts. Faculty may view staff and administration as obstacles to taking students abroad, feeling that they have to jump through too many hoops. However, it is the job of staff to know about these issues and to advise and help faculty meet the university requirements for taking students abroad. While the faculty run the program, in its execution it has many pieces that intersect with multiple offices across campus. It is the responsibility of the faculty to seek out staff early in the process and to work collaboratively with the relevant offices.

Faculty, at least initially, tend to view a faculty-led program primarily from a teaching perspective: that they are going abroad to teach. However, as the central actor, we want to emphasize that faculty take on multiple roles. The obvious faculty role is that of teacher, as he/she is responsible for the coursework and academic program. However, as the trip leader and on-the-ground go-to-person, faculty also take on the roles of manager, tour guide, liaison, mentor, counselor, academic advisor, promoter, friend, disciplinarian, and university administrator. Faculty who think they are going abroad for a vacation or a research trip need to understand that leading a

faculty-led program is a full-time job that demands a high level of commitment. Faculty must have the skills and the motivation to fill all the roles that will be expected of them.

Finally, faculty need to be aware of the student perspective. The destination must be an exciting place where students want to go, and one that markets well. Faculty should offer courses that the students need and want to take. This means they might have to stretch themselves, get outside their narrow disciplinary comfort zone, and develop new course material. Faculty need to recognize that students have multiple motives for studying abroad. They go to take courses and earn credits toward their university's degree requirements, which reflects an academic motive. Otherwise, they would just take a vacation with their friends. We have emphasized that a serious academic program is the foundation of a successful faculty-led program. However, students also go abroad for the adventure and exploration that comes with traveling to and experiencing another country and culture. Faculty need to nurture this sense of curiosity and discovery in students. Program excursion sites should be chosen with this motive in mind as well. Students also go abroad because they want to have fun. This motive does not have to be in conflict with the demands of a serious academic program. Going abroad is fun, which is part of the allure. Faculty need to find a balance. It is the job of the faculty to create and manage the total experience for the students. They do this before, during, and after a program, on campus and abroad, and with students and behind the scenes.

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