THE FORUM ON EDUCATION ABROAD

Guidebook for
The Forum Quality Improvement Program (QUIP)
for Comprehensive Review
Participants and Peer Reviewers©

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I. Preface

Any good evaluation and review of an educational program (specific set of activities, degree program or organization) by peers should fulfill many roles and functions. The two most consequential and common functions are *quality assurance* and *quality improvement*. The first focuses on accountability and the second focuses on development, i.e., continually improving the operation of the program so that students, as the primary recipients of the education program, receive the most effective education possible. Both functions need to be met in order to justify the cost of the reviews by the unit being evaluated and reviewed. In short, the return on the investment of a review depends on (a) being able to demonstrate accountability to the wider constituencies, such as the academy leaders and the general public, who support students enrolled in the specific program, and (b) being useful to the leaders and staff of the unit being evaluated, in terms of program improvement. It is important to note and recognize that these two functions can conflict with each other and may create tensions between the self-study group and the peer reviewers.

How does a professional reconcile being simultaneously a judge (of quality) and a counselor (consultant) of improving quality? Everyone involved in a review process needs to accept this tension and work cooperatively with the other parties to find the best strategy to ensure that these two goals will complement each other

The Forum, in developing the *Standards of Good Practice* and the various types of reviews to apply the standards, has deliberately focused on the improvement function. The title of the review process is intentionally called, "Quality Improvement Program" (QUIP) to stress this focus of the review process. The Forum has developed a set of standards that are comprehensive, and includes a set of inquiries for the eight major categories of Standards, with detailed questions to guide both those desiring to conduct a self-analysis and critique of their own study abroad program and those involved in the formal peer review process outlined in this Guidebook.

The Standards included with this Guidebook are meant to be guidelines as much as they are universal standards. They are not to be used as a set of absolutes that can be uniformly applied to every program. Rather those doing a self-evaluation or a peer appraisal should use these standards as possible benchmarks and broad indicators of quality-- of things to look for in conducting a self study or possibly to include in evaluating a program from an external perspective. In all cases those doing the judging need to be professional, neutral, thoughtful, and cognizant of the local setting, mission of the program, and practical realities. In all cases the Standards are meant to help in the planning for the future of a program. A process of self evaluation and a peer review is most productive when it assists the program leaders to self examine the current strengths and weaknesses, to focus discussions among the various stakeholders, and encourages those responsible for the program to look forward not backward. A peer review, like any evaluation, should be conducted to focus on the future, not the past or the present.

Throughout the process of developing the Standards and QUIP, the core of the review process has been on student learning and development. What do students gain by studying abroad? What is the value added of such experiences? How does a local campus or organization know from the evidence collected that the mission of the organization is being met? Thus documentation of student learning and development is a core part of a self study and of the peer review; in fact, it is to be the beginning and ending of all reviews. Also, throughout the review process the local organization makes a commitment not only to demonstrate its accountability but also to show how it will function in the future, especially on the matters of program improvement. On the other hand, the Forum is committed to honoring the unique mission of the organization and the context of each organization that applies for recognition by the Forum. The Forum is also committed to adapting the set of Standards to meet the local organizational strengths and future goals and needs. It allows for a variety of missions and types of evidence for helping each organization determine and communicate to others how it collects and uses evidence and knowledge of student learning and development that is consistent with its mission.

In designing the Standards and QUIP, the Forum wishes to stress that it will continue to work to make them more useful. Moreover the Standards and the process of peer review may change as more experience with the Standards and the process occurs. However, these Standards have undergone two major updates and a third edition will be officially approved by the Forum's Board of Directors in July 2007. They represent by and large the current thinking of the leaders of education abroad programs. Users should have confidence that these fundamentally represent the best collective thinking of what in general leaders of education abroad programs should address in examining their own programs and submitting a self study for the Forum's QUIP.

II. The Development of the Standards of Good Practice by The Forum on Education Abroad

By Kathleen Sideli, Indiana University; Former Chair, Board of Directors of the Forum; Chair, Forum Board Standards Task Force.
Reprinted from the Final Report of the Forum on Education Abroad's Pilot Project.

Standards of good practice emerged as a priority in January, 2001 at the first meeting of the education abroad professionals who became the Founding Board members of The Forum on Education Abroad. They quickly placed standards as the number one goal of The Forum. Compiling standards of good practice was the first project that the Board tackled, under the direction of Jon Booth, after soliciting input from Forum members in 2002 regarding the top issues in the field that needed standards of good practice. In fact, that survey found that the top ten issues in rank order were: development of standards for academics and program design, research in outcomes assessment/language acquisition, health and safety, finances and financial aid, ethical issues, advocacy, services/staff/faculty development/use of technology, access to/participation in education abroad, curriculum integration and pre-departure/re-entry issues.

Adherence to good standards was considered a necessary attribute of any member institution, organization or individual who joined the Forum. Although finalized standards did not exist at the time the Forum recruited its initial members, the Board added a statement to the membership form that indicated, "By completing this application, I affirm that the organization named below is committed to the highest standards of education-abroad good practices." The Board had agreed that bringing as many organizations into The Forum as possible was the best way to ensure that they would share The Forum's priorities and profit from its advancements in the five goal areas.

To provide continuity in terms of content projects, the Board soon added to its governance structure an Advisory Council (today known as The Forum Council). The first elections were held in July of 2002 and the Council's first task that fall was to charge five committees with carrying on the five goals of the Forum. The Standards Committee, chaired by Bill Anthony, continued the standards project that the Board had initiated. At the CIEE conference in Atlanta in November of 2002 there were roundtables on the Forum's goals, including standards. At the time the Standards Committee announced that they planned to benefit from work done by the field in the past thirty years, to identify areas where standards had not existed, to create products to assist professionals with implementing standards (toolbox, links, etc.) and to seek input from the field along the way. With input from the roundtables in Atlanta and through expert guidance from Dr. Larry Braskamp, the former executive director of the Commission for Higher Education Accreditation (CHEA) and the consultant who produced IES's Model Assessment Practice, the Standards project advanced quickly.

In January, 2004, the Board of Directors voted to have a formal certification process utilizing the finalized standards in three years. During this period the Board planned to seek counsel and advice from various accreditation and certification agencies regarding the pros and cons of various approaches to the application of standards of good practice. That same year the IFSA Foundation gave one of its inaugural grants to The Forum to further the goals of the Standards project, particularly to advance the planning for a systematic pilot project to test the application of the standards. The first formal draft of the standards was released as a publication at The Forum's first conference in Santa Fe in November, 2004, in conjunction with the CIEE conference, and was widely distributed in the field from that point on since it was made available on The Forum's website. Discussion boards on the website also stimulated input from the field regarding the draft document.

A unique opportunity presented itself in 2005 when the US Department of the Justice and the Federal Trade Commission took applications from entities that sought to be the Standards Development Organization in their field. The concept for these SDOs emanated as a means to curb the excesses and misbehaviors of various organizations that had garnered infamous publicity in previous years. Through SDOs, the US government hoped to encourage self-regulation and compliance with standards in such organizations. Geoffrey Bannister, the first executive director and president of The Forum, successfully achieved SDO status for The Forum. This important status carries responsibilities that have helped shape the direction of the organization's application of the Standards since SDOs must exhibit the following elements: *Openness,* defined as the opportunity for involvement by all parties known to be affected by the particular standards development activity; *Balance*, which requires balancing interests so that standards development activities are not dominated by any single group of interested parties; *Transparency*, which calls for readily available access to essential information regarding proposed and final standards; *Consensus,* defined as the requirement that substantial agreement be reached on all material points after the consideration of all views and objections, and *Due Process*, including the right to express a position, to have it considered, and to appeal an adverse decision.

In 2005 a second edition of The Forum's *Standards of Good Practice,* produced under the guidance of Michael Steinberg, chair of the Standards Committee beginning in 2004, was distributed at the second conference in Miami in November, again in conjunction with the CIEE conference. The new edition resulted from the important input of the field. The second edition was designed to be linked to electronic resources at a future date. Other important changes included: a new section on the topic of marketing, a new standard was added to Ethics and Integrity, 43 queries were modified, 17 queries were dropped, 37 queries were added and several US-centric phrases and suggestions were modified. The most important change was publishing the eight standards separately from the queries so that they would stand out more clearly. The query approach was retained since most individuals involved with the project felt this was the best way to guide the users of the standards.

The Pilot Project was initiated in 2005 and continued through 2006, involving over 20 institutions and organizations, although not all of them completed the project due to competing activities. Program reviewers were selected from volunteers from the membership, with two assigned to each institution or organization. Guidelines for self studies and for the on-site evaluations were created to assist everyone engaged in the process. Visits took place in the summer and fall of 2006, culminating in a Summit at Dickinson College, the current home of The Forum, in late November of 2006 where representatives from the Council's Standards Committee, Forum staff and other Forum leadership benefited from lessons learned through the Pilot Project.

In January of 2006 the Board of Directors created a Task Force on Standards to make a recommendation to the Board regarding the formal utilization of the Standards, in consonance with the Board's vote in January of 2004 to have a process created within three years. After much deliberation and consideration regarding a number of options, the Task Force recommended a process that is called The Forum's Qualify Improvement

Program (QUIP). This is very much in keeping with the directions in the field of higher education today which focus more on quality improvement than strict accountability models. QUIP will be useful to the wide range of institutions and organizations in the field of education abroad, which vary immensely in terms of their own self evaluation systems. QUIP offers a standardized approach to program and system reviews. Today, offices and programs often invite peers to evaluate their operations without access to an agreed-upon process or template. QUIP should quickly become the standard in the field for evaluating offices and programs. There are a variety of types of QUIP, depending on the scope of the review. All reviewers will undergo training so there is consistency with the evaluation processes. Institutions and organizations will also receive guidance regarding the self-study component.

The Forum recognizes that many individuals, institutions and organizations may have different opinions about the best way to apply standards in the field of education abroad. The current process reflects the work of many, many individuals and experts and has been democratic in nature from the start. While the process may not be perfect, it is the most deliberate, most focused and most collaborative process of its kind that the field has known to date in the area of ensuring standards of good practice. We invite the Forum membership to support QUIP and to help make it the success it should be. Our students deserve no less.

III. The Forum Quality Improvement Program (QUIP)

The Forum QUIP is designed to help organizations improve the quality of their international programming. From the outset, let us stress that this is not a compliance review or accreditation or certification process. The purpose is to help an organization improve the quality of its offerings and to think strategically about its future involvement in education abroad. That said, an organization may find it useful to link the self-study to a formal accreditation review of the organization, when one is conducted. QUIP addresses general aspects of programming such as ethics and integrity, and organizational and program resources as well as specific dimensions of international programming related to education abroad for US students. In the broadest terms, the focus of the review should be on student learning and development in education abroad, and how an organization fosters this via its academic programs and administrative procedures. The two most important specific dimensions are the design, operation, and management of education abroad programs, and the operations of a education abroad office at a sending school in the US.

QUIP is intended primarily for:

(1) Any organization that runs one or more education abroad programs. This includes US colleges and universities that run programs for their own students or for American undergraduates generally, so-called 'third party providers,' which typically run programs that colleges and universities include in their own offerings, and overseas organizations, whether institutions of higher education or other organizations, that provide education abroad experiences for US students.

(2) Any US College or University which, while not operating its own programs, offers education abroad services to students, evaluates programs, maintains partnership relationships with program operators, offers credit, and provides other support services to students who choose to study abroad.

Depending on which description best fits a particular organization, and on the scope of its operations, its self-study will address one or both of the specific international programming dimensions mentioned above, education abroad programs and sending school operations. An organization should consider the Standards and queries carefully to determine which best apply to its operational model. Not all queries apply to all types of programs.

The focus of QUIP is the future development and improvement of organizations that participate. This is not an accreditation program, although the insights a QUIP review provides may prove valuable in accreditation processes, such as those carried out by regional accrediting bodies. The focus of QUIP is forward-looking. The Self-Study Team will respond to the queries with reference to current organizational goals, mission, programs, and operations, and with reference to past activities, always keeping in mind that the goal is to achieve future improvement of education abroad. The Forum's aim is to help organizations by offering suggestions for improvement.

The Types of QUIP Reviews

The three types of QUIP reviews are:

1. **Comprehensive Program Review** (Available in Fall 2007)

This is the basic QUIP product and the one that will be the most prevalent. It is intended for institutions and organizations that offer Education Abroad Programs either exclusively for their own students, or for the wider US undergraduate market. Examples of institutions for which this review is appropriate include:

A. A US college or university that offers several programs that are only available to their own students;
B. A US college or university that offers several programs and markets them to the wider US audience;
C. An overseas institution (college, university, or other) that offers one or more programs and markets them in the US;
D. A third-party provider.

2. **Review of Evaluation Processes** (Available in Fall, 2008)

This type of review is appropriate for providers and institutions with elaborate education abroad evaluation systems as well as institutions that do not offer their own programs and seek to evaluate their mechanisms for sending students on programs sponsored by providers and other institutions.

The review of a provider or university education abroad evaluation system involves a review of evaluation mechanisms, including what use is made of the evaluations and the recent history of improvements that have resulted. This type of review is appropriate in cases where an institution or organization has an elaborate review process, involving independent parties, and has a mechanism for ensuring that reviews are used for quality improvement.

For institutions that send their students on programs offered by other schools or providers, this review will involve a Self-Study of the mechanisms that relate to program approval, the student application process, and granting of credit, as well as a review of mechanisms in place to determine on an ongoing basis how well the programs used are serving students. This type of review is appropriate for institutions that depend largely on programs offered by other institutions and organizations. Examples of institutions for which this type of review is appropriate include:

A. A provider with a well-established system for evaluating its programs;
B. A college or university that has a well-established system for evaluating its Education Abroad Programs;
C. An institution with a small study abroad office that runs very few, if any, of its own study abroad programs.

3. **Guided Strategic Planning** (Available Fall, 2008)

This type of review will assist institutions and organizations that are either just beginning the process of developing Education Abroad Programs, or those that want assistance in moving in new directions. Organizations in this QUIP category include:

A. An institution or organization that is rethinking its strategic plan in light of recent changes such as new leadership, opportunities, or challenges;
B. An institution that has recently decided to establish a study abroad office or program and needs assistance in planning for its development;
C. An institution or organization that has decided to expand or enhance (or has already done so) its programming and needs assistance in navigating this expansion.

The QUIP Process: Overview

The main elements of the QUIP review process are:

1. The preparation of a Self-Study Report by a Self-Study Team appointed by the organization under review. Typically this team will include administrators, faculty, and staff.
2. A site visit by a Peer Review Team of education abroad professionals not employed by or otherwise directly related to the organization under review,
3. Preparation of a Peer Review Report by that team based on the Self-Study Report and the meetings and discussions of the Site Visit,
4. A response by the Self-Study Team, which may include correction of factual errors contained in the Peer Review Report, discussion of the Report's findings, an indication of any areas of disagreement, and most crucially, an indication of the organization's plans for future improvement,
5. A thorough review of both Reports by the Forum Review Panel (FRP) The Forum Review Panel is a group of education abroad professionals appointed by the Forum Board of Directors and Forum Council, and
6. A final letter summarizing the findings of the QUIP review, written by The Forum Review Panel to the organization.

The Forum Review Panel's final letter will include a statement indicating whether or not the organization's education abroad programming, in light of its own mission and purpose, demonstrates a commitment to highest quality education abroad practices, in relation to the Forum's Standards of Good Practice.

The next sections of this Guide provide instructions and strategies for the organization under review, and suggestions, a worksheet and a template for preparing the Self-Study Report. Following these is a section for Peer Reviewers, which includes a discussion of the Peer Review Process and responsibilities of Peer Reviewers, a worksheet and a template for the Peer Review Report.

Organizational Representatives and Peer Reviewers should continue and read all following sections, to become familiar with the detailed instructions that both groups receive.

IV. Instructions and Suggestions for Organizations

The Forum QUIP Review Process has been described in detail in the preceding section. In brief, the process consists of three fundamental steps.

1. The organization conducts a self-study and writes a Self-Study Report.
2. A team of Peer Reviewers examines the Self-Study, visits the organization and/or its programs and issues a Peer Review Report.
3. The Forum Review Panel reads the Self-Study and the Peer Review Report and issues a letter describing the results of the evaluation.

The Forum Review Panel's final letter will include a statement indicating whether or not the organization's education abroad programming addresses sufficiently the Forum's *Standards of Good Practice*, in light of its own mission and purpose.

This section of the Guidebook provides instructions and strategies for the organization under review, and suggestions for preparing the Self-Study report. Organizational representatives also should become familiar with the next section, for Peer Reviewers, and the detailed instructions provided for Peer Reviewers.

A) The QUIP Self-Study Team

Once an organization has been scheduled for the Forum QUIP, the first critical step is the appointment of the Self-Study Team and designation of the Team Leader.

The composition of the Self-Study Team is critically important. Members of the Team should be familiar with education abroad practices at the organization. The team should include at least one person whose position affects change in that organization. The number and composition of the team is an organizational prerogative, but we suggest:

- Three to five team members is an effective size for the Self-Study Team.
- In reviews involving multiple programs or offices, a larger team which includes one or more representatives from each program site may be necessary.
- The senior international officer at the organization should be a member of the team.
- If faculty are actively involved in education abroad policy making or program management, a faculty representative should be included.
- Including at least one person outside the education abroad programming staffing adds value to the review for the organization.
- Teams should include at least one excellent writer who is willing to undertake the drafting of the report.
- Some organizations have found it useful to bring in an outside consultant to help with the self-study process.

B) Designating the QUIP Self-Study Team Leader

The Self-Study Team Leader serves as the organization's contact person with the Forum. Other tasks include coordinating the activities of the Self-Study, providing guidance and assistance to the Self-Study Team, making sure that deadlines are met, coordinating the writing of the self-study report, submitting the Self-Study Report to the Forum and coordinating the site visit.

A vital role of the QUIP Self-Study Team Leader will be to keep the Self-Study on track. The QUIP Self-Study Team Leader should be able to communicate regularly and openly with team members and any program site staff, to check on the status of Self-Study assignments, and to facilitate sharing information between team members and information from the Forum. In many organizations, the self-study will be an added job responsibility for faculty and staff. Faculty and staff may find that other priorities affect their ability to meet self-study deadlines, and the Self-Study Team Leader should be ready to remind all involved in the QUIP process of deadlines within the timetable, and even of the broader goals of the project.

The role of Self-Study Team Leader is pivotal to the QUIP process. Within the framework of existing organizational job-related responsibilities, the Self-Study Team Leader must be given the responsibility, authority, and the time to coordinate the QUIP review process.

C) Preparing for QUIP

Good advance planning is key to a successful Self-Study. Once the Self-Study Team and the Team Leader have been designated, working through the planning steps described next will facilitate the success of the Self-Study process:

1. <u>Build in Support</u>
Key stakeholders who had been contacted in advance of applying to participate in the QUIP review should be re-engaged at the outset of the Self-Study process. The Team Leader should confirm all stakeholders in education abroad and/or international operations and make sure that appropriate representatives within these departments or groups are aware of the participation in QUIP, the Self-Study, understand its goals, and are willing to provide input. Stakeholders within the organization, but outside education abroad operations, who may be consulted or interviewed during the process should be identified and contacted.

2. <u>Plan Communication and Data Gathering</u>
The Self-Study Team should agree in advance on a communication plan, data needed for the Self-Study, and how and who within the team will gather the data. What meetings will be needed? How often? Who will interview whom? Will opinions be sought in writing? Verbally? How will data be shared among team members? Reading through the template for the Self-Study and the Queries worksheets will help determine the kind of information needed for a full Self-Study, and the sources from which the information will be obtained.

3. Establish a Timetable

A realistic internal timetable for the Self-Study and for the site visit is essential. The timetable is crucial to keeping the project on track and establishing expectations among the Self-Study Team and other stakeholders. The timetable should be developed keeping in mind periods of more and less intense office and program activity, and other organizational obligations. When are the busiest times? When will staff and program directors have time to devote to the Self-Study and the Site Visit? When will students be available, either on campus or on-site, for interviews with the Self-Study team and with Peer Reviewers during the Site Visit? When will constituents be away from campus? What are especially busy periods for other organizational sources of information, such as the Registrar's office or Organizational Research offices. Acknowledging these details and building them into the timetable will help achieve the most benefit from QUIP.

D) Conducting the Self-Study

Conducting a comprehensive Self -Study is the most important and most beneficial part of the review process. This is the Self-Study Team's opportunity to explore the organization's mission, philosophy, policies, and procedures and assess the extent to which current practices are serving the education abroad goals of the organization. The resulting document should be considered as the organization's opening statement in a dialogue with the Peer Reviewers that will explore in depth the nature of the organization's education abroad activities. Together the Self-Study Team and the Peer Reviewers will seek to identify ways the organization can improve their education abroad efforts.

1. *The Standards of Good Practice* and the Self-Study

In conducting the self study, the *Standards of Good Practice for Education Abroad* should be used as a guide. The main goal should be to present an accurate description of the organization's education abroad activities and to analyze them with reference to the points the Forum has identified through the Standards as key indicators of high quality.

Should the Self-Study Report be organized primarily, or even exclusively, as answers to the queries that appear in the Standards document? Experience has shown that a question by question set of answers to the QUIP queries usually does not allow an organization to present a clear picture of the essential features of its programs. The best self-studies make it easy for a Peer Reviewer to understand what is important at the organization: What is the organizational mission? What are its most important education abroad activities? How do they relate to the mission? Who are the key players? What problems has the Self-Study Team identified that it would like to work on? What unique cultural attributes must be a Peer Reviewer be aware of in order to form a good understanding of the organization and its programs?

Reading through the Template for Self-Study Reports included in this Guidebook before beginning work with the Self-Study Team will help to plan the analysis, interviews, and discussions that are needed in order to complete the self study. The type of information you choose to include will help you decide on the most appropriate format for your report.

Many of the Standards and their queries apply to specific activities, and some Standards may refer to activities in which the organization does not engage. As well, a number of the standards are addressed to programs delivered in languages other than English. Not all of the Queries are applicable to all types of education abroad programming. [If the program(s) are delivered in English, in the Queries worksheet, it would be designated "NA." ("Not Applicable").]

Many of the queries are phrased so that they might be answered with a simple yes or no; however, in most cases, a simple yes or no is not an adequate answer. For example, in considering the question "Does the program or the provider have procedures for evaluating faculty and staff?" an appropriate answer would provide details concerning the evaluation procedures. Who evaluates the faculty? Who reads these evaluations? How are they used to improve quality? How often do the evaluations take place? Samples of evaluation forms may be provided as an appendix to the Self-Study

In conducting the Self-Study, focusing on the self-study process, not on the resulting document will make the Self-Study a worthwhile project for all involved. Focusing on the process of the Study will lead to good probing discussions about what the organization is doing, why, how well it is being done, and how to change or how to carry these plans into the future. The results of these discussions should be conveyed through the Self-Study Report to the Peer Reviewers.

2. The Queries Worksheet

A worksheet of the Standards Queries is distributed electronically along with this *Guidebook*. Self-Study Teams should use this Queries Worksheet to make notes as the team conducts the self-study analysis. The worksheet also has a column that can be used to keep a record of suggestions for future actions. In addition, there is a column for an appendix number, if the team has included an appendix that illustrates the organization's approach to a specific Standard or Query.

Below is an example of a page of the Queries Worksheet.

STANDARD 1
MISSION: THE ORGANIZATION HAS A FORMALLY ADOPTED MISSION STATEMENT FOR ITS OVERALL OPERATIONS AND FOR ITS INDIVIDUAL PROGRAMS THAT IS KNOWN TO AND ACCEPTED BY ITS FACULTY AND STAFF.

a. Mission and Commitment: The organization has mission statements appropriate for each Program.

Standard.Query	Query	Analysis	Proposed Action	Appendix
1.a.i	Does the organization have a mission statement for its Programs? If so, what is it?			
1.a.ii	Does each Program have clear objectives?			
1.a.iii	Does the organization clearly define expected outcomes?			

Once the Self-Study Team has completed the analysis, it will be easier to select specific sections of the worksheet for inclusion in the Self-Study Report.

Further along in the review process, the Peer Reviewers will add their comments and suggestions on their own Follow-up Worksheet. These two sheets are keyed to each other by the Queries. The Review Team will also comment on the degree to which the organization addresses the Standards in the Queries Worksheet. The Peer Reviewer's worksheet also contains additional columns for the organization to keep track of progress in completing actions that the organization may decide to undertake.

3. The Self-Study Report

In order to guide organizations in the preparation of a useful Self-Study Report, we have provided a template for the Self-Study Report. The template is included here as Appendix 1 for reference and also will be distributed electronically. All organizations should complete the initial sections exactly as they appear in the template. The remaining eight sections will constitute the body of the Self-Study Report. The template is not intended to be rigid. If there are changes that will help the report more accurately reflect the situation at the organization, please feel free to make these changes. However, please follow the numbering system included in the template.

Appendix 2 provides a sample of an organization's narrative Self-Study (reprinted with permission from Villanova University).

4. Submitting the Self-Study Report

Once the Self-Study is complete, it should be submitted to the Forum Office electronically to: forumea@dickison.edu. Please submit to the Forum office five copies of any publications, print material, supporting documents or other material attached as appendices that are not able to be distributed electronically. The Forum staff will distribute the Self-Study Report and appendix material to the Peer Reviewers.

At the same time as submitting the Self-Study Report, organizations should also submit a preliminary schedule for the Site Visit.

Please note that the deadline for the Forum to receive the Self-Study is no later than one month before the scheduled Site Visit, in order for the Peer Review Team to have enough time to review the documents thoroughly. A delayed submission of the Self-Study Report may result in rescheduling the Site Visit. Should the organization believe it will not be able to meet the Self-Study deadline, it should communicate with the Forum staff well in advance of the deadline, to coordinate any rescheduling.

5. The Role of the Forum Staff

The Forum Staff acts as a source of information about all aspects of the QUIP process and supports all participants in the QUIP process, including

- Coordinating scheduling of the dates of the Site Visit,
- Facilitating flow of all information and communication between the organization and the Peer Reviewers, including relaying any requests from the Peer Reviewers for additional clarifying information,
- Managing QUIP deadlines,
- Assisting Peer Reviewers' travel arrangements,
- Coordinating distribution of materials to the Forum Review Panel.

6. Working with the Peer Reviewers

The Forum will contact the organization with the names of the Peer Reviewers and the dates for the visit. If the Forum has selected a reviewer that the Self-Study team feels is inappropriate, the Forum should be contacted. Every effort will be made to select a team that is agreeable to the organization, but final selection rests with the Forum. All Peer Reviewers are required to sign a form indicating no conflict of interest and agreeing to keep the material in the Self-Study, content of meetings and the results of the review confidential. It must be stressed that although the reviewers will make every effort to help the organization meet its goals, ultimately, the reviewers report to the Forum. Their work is directed by the Forum and their written review becomes the property of the Forum.

The Forum staff will coordinate the dates of the Peer Reviewers' Site Visit. Dates are set taking into consideration the schedules of both the organization and the reviewers. There must be at least a month available to the reviewers to read the Self-Study Report and prepare for the visit.

Once the date is agreed upon, the Forum will coordinate the schedule of the Site Review meetings, based on a suggested schedule provided by the organization

The Site Visit is assumed to last two days. The organization should prepare an initial list of meetings and people to meet with the Peer Reviewers, but the Peer Reviewer Team may also make some requests for specific meetings. The Peer Review team has the prerogative to determine the final schedule for the visit.

The Peer Review Team may also request, through the Forum staff, additional information, which should be provided as promptly as possible.

It is usually beneficial to have a conference call involving the Self-Study Team leader, other key people from the organization, the Peer Review team and the Forum staff.

<u>Site-Visit Information Packet</u> The Self-Study team should prepare a packet containing any informational materials they Peer Reviewers have requested that may have not been sent beforehand, a copy of the schedule and a list of people with whom the Peer Reviewers will meet. This should include complete contact information, contact information for the team leader and any staff members assigned to help with logistics of the visit, maps and directions, and any special information required to navigate the immediate environment (how to get a taxi, etc.).

<u>The Site Visit</u> The Self-Study Team Leader will need to keep his/her calendar as free as possible for the days of the visit. The Self-Study Team Leader will not need to accompany the Peer Review Team for the entire time of the Site Visit, but he/she needs to be available to them.

The Peer Review Team will need access to a computer (and, when requested in advance and available, access to a laptop computer for taking notes) and the Internet, and in order to work on the Peer Review Report. They should also have access to a place where they can meet privately, and have access to a telephone.

<u>Meetings</u> Although schedules for Site Visits will vary from organization to organization, these key elements that should be included in all visit schedules:

- Time for the Peer Reviewers to meet separately, both at the beginning of the site visit and at the end.
- At least two meetings with the Self-Study Team Leader, at the beginning and at the end of the Site Visit.
- A meeting with the CEO, or the Chief Academic Officer, or the person to whom the Chief International Officer reports.
- Meetings with faculty. These can be faculty who teach education abroad participants, program or resident directors, or faculty from departments sending significant numbers of students abroad.
- Meetings with students, those on the program or returnees.
- At least one meeting with the entire Self-Study Team,
- Some flexibility for the Peer Review Team to make changes to the schedule based on what may be learned as the visit progresses.
- Enough room to allow for additional meetings, if required.

All those scheduled to meet with the Peer Reviewers should be thoroughly briefed by the Team Leader in advance of the meeting so that they are aware of the goals of the Site

Review, know what the Forum is, and are familiar with the materials that the Peer Reviewers received.

E) The Peer Review Report and Organization's Response

About ten working days after the conclusion of the Site Visit, the Peer Review Report will be sent to the organization, along with the Peer Reviewers' Queries Worksheet. It will contain any detailed recommendations made by the Peer Reviewers in considering the organization's analysis of the queries.

The Self-Study Team should read carefully through the Peer Review Report and the Worksheet at this time. The organization should formulate a response immediately. This response should correct any factual errors or clarify misunderstandings that may have occurred as the Peer Reviewers considered the Self-Study Report. These corrections are typically of a nature such as misspelling a name, or misstating the role or title of an administrator.

The Self-Study Team may also at this time choose to identify aspects of the Peer Review Report that it agrees with and those with which it disagrees. Statements should be concise, but should give specific reasons for any disagreements.

Finally, the response should include a description of plans for future improvement that have been agreed to by all involved parties at the organization.

Appendix 3 provides a sample of an organizational response (reprinted with permission from the Institute for Study Abroad – Butler University).

F) The Forum Review Panel

The Forum Review Panel (FRP) is a committee of education abroad professionals nominated by a joint committee of the Forum Council and the Forum Board of Directors. Each FRP member must sign a confidentiality agreement and conflict of interest statement. The FRP is charged with responsibility for reviewing the materials produced in conjunction with each Review. Typically two panel members will each read the Self-Study Report and the Peer Review Report and any responses that the organization under review has submitted, and offer an opinion as to whether the materials submitted provide evidence that the organization is in substantial conformity with the Standards of Good Practice. If the two readers agree, a Final Letter will be sent to the organization indicating the result of the review. If there is disagreement, a third reader will be assigned.

1. <u>Possible Outcomes of the QUIP Process</u>
As stressed earlier, the QUIP process is not a pass/fail test. The result is not a simple yes/no answer. If we had to condense the possible outcomes to short answers, the two possible results would be "yes" and "not yet." The Forum believes that all organizations have the capacity to conduct their programs in consonance with the Standards, and, as stated earlier, the Forum's goal is to help each organization be the best that it can be. Therefore, a frequent outcome will be something like "yes, organization X's operations

and programs show a commitment to the *Standards of Good Practice*, *and also* we endorse the recommendations for improvement offered by the review team and commend them to the attention of the organization."

2. Organizational Use of the Written Materials
The Self-Study Report is the property of the organization and can be used however the organization sees fit. The Final Letter may also be used by the organization in any way desired. The Peer Review report remains the property of the Forum and may not be disseminated outside the organization. It can not be posted on the web for the public to view.

3. Validity of the Review Result
If the Final letter states that the organization demonstrates a commitment to Standards of Good Practice, this finding is valid for a period of eight years, and the organization may quote from the Final Letter in promotional materials during that period.

G) Resources: Forum Web Site, The Standards Toolbox, Staff

Additional information about the Forum on Education Abroad, about the Quality Improvement Program, and about the *Standards of Good Practice* is available on the Forum website at www.forumea.org .

In addition, the Forum has developed an online resource, The Standards Toolbox. This resource is password-protected, and contains examples of best practices in education abroad through documents and hyperlinks submitted by Forum members. The Standards Toolbox is structured so that links to examples of best practices which directly relate to the *Standards* and Queries appear alongside the text of the Standards and Queries themselves.

Online resources meant especially for QUIP reviews will also be made available through the Standards Toolbox.

The Forum staff is always available for consultation for any type of question or concern, via email (forumea@dickinson.edu) or by phone: 717-245-1031.

H) Timetable

The timetable for each QUI P review will be based on the parameters of the organization's specific review. One of the benefits of a QUIP review is its flexibility to work with an organization's own calendar. Following is an illustration of a QUIP review set within a timetable and a suggested sequence.

March 5, 2007: Forum begins accepting applications from organizations wishing to participate in the 2007-2008 QUIP.

One month after acceptance into QUIP : Self-Study Team and Team Leader should be selected. Key stakeholder constituencies and other participants should be identified and contacted.

Three months after acceptance into QUIP: The Self-Study Team should be wrapping up the Self-Study by this point. (With good timing a few organizations may have completed their Self-Studies by the end of June.)

September 2007 Peer Reviewers identified and Forum staff facilitates contact and flow of information between Peer Reviewers and organizational team.

By October 1 Dates set for the visit.

October Conference call, additional information provided, other preliminaries.

October, November, December: Site Visits

January 2008 Peer Review Reports submitted to organizations.

February 2008 Organizational responses received by the Forum. Forum Review Panel assignments made.

By March 1 Forum Review Panel Responses received by the Forum and Final Letters sent.

I) Checklist for Self-Study Team Leaders

- Forum Fee paid
- General organizational timeline for QUIP process established, including date for submission of Self-Study Report and suggested dates for Site Visit
- QUIP Self-Study Team Members appointed
- QUIP Self-Study Team Leader designated
- Key stakeholder constituencies and their representatives identified for interviews, data gathering
- Support for the project confirmed
- Information about the Forum and QUIP and the Standards distributed at organization as needed
- Self-Study Organizational Meeting—members agree to specific assignments
- Review of Standards and Queries with Self-Study Team
- Interviews, consultations, data collection completed
- Queries Worksheet completed
- Broad content of Self-Study Report agreed upon
- Draft of Self-Study Report completed and distributed to team members
- Discussion of draft
- Final draft completed and sent to Forum , together with general plan for Site Visit
- Peer Reviewers identified by Forum
- Site Visit dates agreed to by organization and Peer Reviewers
- General plan for Site Visit agreed to by organization and Peer Reviewers
- People to meet with Peer Review team identified

- Project information sent to interviewees
- Any additional information requested by Peer Reviewers provided to Forum staff
- Detailed schedule agreed to by organization and Peer Reviewers
- Meeting space for Peer Reviewers identified and reserved
- Accommodations for Peer Reviewers identified and reserved
- Arrangements for meals and ground transportation finalized
- Visit completed
- Peer Review Report received and circulated as agreed in protocol
- Team Meeting to discuss Report
- Initial Response sent to Forum
- Final Letter Received

V. Instructions and Suggestions for Peer Reviewers

This section provides a discussion of the role of Peer Reviewers, and detailed instructions for the Site Visit. Peer Reviewers should also become familiar with the previous section, for Organizations.

A) Role of the Peer Reviewers

The role of Peer Reviewers is to review the organization's Self-Study Report, including website references and documentary evidence, to conduct a Site Visit, and to write a Peer Review Report. Specifically the Peer Reviewers are asked:

- to determine if the Self-Study Report accurately and fairly describes the operations under review within the context of the Forum's *Standards of Good Practice for Education Abroad* (The Standards);
- to determine if the organization's Self-Study Report adequately addresses all queries applicable to the organization/program under review;
- to identify areas of the Self-Study report that may be incomplete, or need further information, documentation or explanation;
- to suggest areas of quality improvement, within the context of the Standards, to the organization/organization and the Forum Review Council;

B) Ethical Behavior

Reviews are to be carried out adhering to ethical principles that are well established, both in the education abroad community and in organizations which conduct broader reviews in higher education. These include the following norms:

- The ultimate aim of the review process is to benefit students, the organization and the field of education abroad.
- Unsolicited information received anonymously may not be included in the review processes, but confidentiality may be offered , if requested, to individuals submitting information.
- The Peer Reviewers should make every effort to filter out biased or non-objective sources of information obtained during the process.
- Peer Reviewers' recommendations should be realistic and consider budgetary implications, implementation timetables, and the feasibility of assessment and evaluation plans.
- The reviews are of organizations and programs, not people; harmful effects to individuals should be minimized.
- Peer reviewers must not accept favors, services or gifts from any interested party. A token of appreciation such as a coffee mug or a pen is acceptable but any object of greater value should not be accepted.

C) Avoidance of Conflict of Interest

Peer reviewers should have no conflicts of interest, or apparent conflicts of interest, with the organization being reviewed. Each Peer Reviewer must sign a conflict of interest form (Appendix 4) attesting to this. If during the conduct of a review, a Peer Reviewer becomes aware of a circumstance that may represent a conflict of interest or apparent conflict of interest, he/she should contact the Forum immediately for advice on how to proceed.

D) Confidentiality/Non-Disclosure

Given the nature of their task, it is likely that during the review process, Peer Reviewers will be recipients of information considered as confidential or privileged by the organization being reviewed. Peer Reviewers must agree not to disclose any information deemed confidential, and must sign a confidentiality/non-disclosure agreement (Appendix 5).

As representatives of the Forum, Peer Reviewers must act in the best interests of the Forum, and to protect the integrity of the QUIP review process. Specifically, Peer Reviewers should keep in mind these suggestions:

1. Keep all information confidential.

2. Refrain from discussing or seeking advice about a particular review from any person not associated with the Peer Review Team or not a member of the Forum staff.

3. Avoid discussing the name of a program or organization when you are in communication with colleagues outside the review, and do not relate information, even anecdotes, about the organization after the Site Visit.

4. Don't discuss specific information about other organizations during meetings and interviews; during meetings don't reference practices used at your own organization.

5. Don't use the visit for personal gain: don't promote yourself as a candidate for a job with the program or organization under review.

6. Don't use the visit for professional gain: do not use it to identify people you would like to hire, or proprietary practices you would like to adopt.

7. Don't give advice to the organization during the site visit, even in minor areas.

8. Don't share confidential information gained through interviews and meetings, with other organizational representatives, unless explicitly authorized. When in doubt, ask whether or not information is to be shared with other internal constituents.

The strength of the Peer Review process, in which organizations under review have vested their good faith, lies in the professionalism and ethical conduct of the Peer Reviewers.

E) The Peer Review Team

In general, the Peer Review Team will consist of two members, one of whom is designated as the Team Leader. In some cases, more than two members may be assigned.

F) Travel, Accommodation and Other Arrangements

Peer Reviewers must use the Forum's travel agency to arrange any air or train travel, at coach fare. Should the Peer Reviewer wish to travel with a preferred carrier or at a higher level of service, the Peer Reviewer is responsible for paying the difference in price between the lowest coach fare and the fare of the preferred carrier. Travel by personal auto will be reimbursed at the Dickinson College rate. The Forum will provide the cost of one extra night's stay on international site visits. The organization under review is responsible for expenses during the visit, including but not limited to accommodations, meals, airport transfers and incidental office expenses.

The organization under review will provide the Site Review Team with a room to meet in privately with access to a telephone, access to a computer and the Internet (and, when requested by Peer Reviewers in advance and if available, a laptop computer for taking notes).

G) Conducting the Review: The *Standards of Good Practice*, the Queries, and Quality Improvement

QUIP is a unique review model: it is based on the Forum's *Standards of Good Practice*; it emphasizes quality improvement rather than compliance; and it is customized to fit the education abroad mission of each institution. Understanding each of these elements is essential to offering the organization the fullest benefits from the Peer Review process.

<u>The Standards</u> The ultimate goal of the *Standards of Good Practice* is to establish a framework that will improve practices, such that students' international academic experiences are as rich and meaningful as possible. The Standards recognize that there are no "one-size-fits-all" answers for how organizations and programs should address a broad range of study abroad issues. Students come from different backgrounds and a variety of disciplinary interests. It would make no more sense to impose monolithic standards on all international programs than it would to assume that all study abroad programs ought to aspire to identical educational goals. The Standards are designed to fit a wide range of program types including direct enrollment programs, hybrid programs, island programs, and field research programs.

<u>The Queries</u>
The strategy chosen by the Forum Council's Standards Committee when it drafted the Standards, was to express them as a set of Queries rather than as prescriptive statements. This approach would allows for organizations to respond to the Standards in diverse ways

depending upon the organizational context. Nevertheless, the Forum's Standards do have broad expectations about the general characteristics of best practices in an education abroad program or service, and these are expressed in the headings and subheadings of the Queries. One of the tasks of the Peer Reviewers is to determine whether these fundamental expectations are met at the organization under review.

Not all Queries may be applicable to each organization's programming and administrative structure. For example, it is clear that for a program based in an English-speaking country, the Standards and Queries relating to foreign language instruction simply do not apply. That said, if the Peer Reviewers feel that a Query has been inappropriately passed over by an organization, they should ask for an explanation of why that Standard or Query had not been addressed

The Queries may be answered in a variety of ways. In the preceding section Self-Study Teams were asked to avoid simple 'yes or no' answers. If the Peer Reviewers feel that a "yes" or a "no" requires further context, they should feel free to ask for clarification or documentation to illustrate the answer.

<u>Quality Improvement</u>
QUIP's goal is not to impose a list of requirements of good practice that apply in the same way to all education abroad programs and professionals, unlike most accreditation or compliance models of program review. It is expected that practitioners, organizations, consortia, and associations will employ the Standards in ways that are most beneficial to the specific circumstances of various organizations. In this way, a QUIP review relates all observations and recommendations to the education abroad mission of each organization, to determine if their practices are the best practices, within the context of the Standards, serving their education abroad mission.

H) Prior to the Site Visit

Peer reviewers should expect to receive the Self-Study and accompanying materials four to six weeks in advance of a visit to the organization and/or its programs. As soon as a team has been constituted for a specific review, the Forum staff will begin the process of making advance arrangements for the visit or visits.

<u>Peer Review Team Leader responsibilities</u>

Specific responsibilities of the Peer Review Team Leader include.

- Determining the role/assignments of each Peer Reviewer for the Site Visit.
- Determining, in consultation with other team member(s), any additional documentation that may be needed from the organization/program under review.
- Prepare notes and questions for interviews and meetings in consultation with other team member(s).
- Through Forum staff, communicate with organization/organization to adjust the Site Visit schedule to include constituents identified by Peer Review Team.

- Coordinate the writing and delivery of the Peer Review Report

Responsibilities of all team members

- Obtain and read all materials of the Self-Study Report.
- Become familiar with the organization or program to provide a context for the Review.
- Participate in conference calls and email exchanges with the organization/organization under review and with the other Peer Reviewer(s).

I) During the Site Visit

Peer Reviewers should expect to devote full time to the visit, including evenings. The schedule of the Site Visit is intended to maximize interaction with site staff and facilitate the writing of the Peer Review Report. During the actual Site Visit, it is not expected that there will be time for tourist activities or for recreational activities. Specific responsibilities of the team members during the visits are as follows.

Upon arrival
Peer Reviewers should meet together before meeting with the organization's representatives in order to prepare for the visit, either on the afternoon or evening before the first day of Site Visit meetings. (Travel arrangements should be made with this meeting in mind.) Suggested action points for this meeting are:

- review the schedule of meetings and interviews;
- review the responsibilities of each Peer Reviewer;
- discuss issues that need to be addressed during the Site Visit;
- decide on the work division for the Peer Review Report;
- discuss any new suggestions and any other action points.

During the visit:
Interviews and meetings as established by the organization and the Peer Reviewers.

Before departure:
Concluding meeting of Peer Reviewers. The concluding meeting should be held on the afternoon of the second day of the visit and normally, one half-day should be devoted to start the writing of the Peer Review Report. Normally, the Visit (and reimbursement for expenses) will end at the conclusion of the second day. Travel arrangements should be made with these points in mind.

Suggested action points for the Concluding Meeting:

- identify any outstanding issues;
- review duties of Peer Reviewers in completing the report;
- establish timetable for completion and delivery of Peer Review Report.

J) After the Site Review Visit

After the Site Visit is concluded, the goal is to deliver the Peer Review Report as soon as possible. Peer Reviewers are responsible as follows:

- Following the established timetable, generate the Peer Review Report.
- Submit the Peer Review Report to the Forum Offices as an e-mail attachment in Microsoft Word and Microsoft Excel formats.
- Be available to answer questions that may be posed by the Forum Office and/or the Forum Review Panel.

K) The Peer Review Report

In this section we provide general guidelines for the Peer Review Report. Peer Reviewers are asked to return one electronic copy of the Peer Review Report to the Forum office (forumea@dickinson.edu). **Peer Reviewers should not send any materials directly to the organization under review.**

Peer Reviewers will be asked to sign a form assigning copyright of the Peer Review Report to the Forum. The Peer Review is considered property of the Forum.

The Peer Review Report consists of two parts

1. A Follow-up Worksheet on which Peer Reviewers may comment on the organization's responses to the Queries. It is not necessary to provide an entry for each Query. Some of the rows on the worksheet may be left blank. Peer Reviewers should only make an entry on a particular query if they feel that the organization's answer is inadequate or incomplete, or if the team wishes to offer a concrete suggestion for future development. The Follow-up Worksheet becomes an integral part of the Peer Review Report and is distributed with the Narrative Report to the organization and to the Forum Review Panel.
2. A Narrative Report following the template provided here (Appendix 6) and electronically, in which the team provides its consultative comments and advice related to the basic issues posed in the review. A sample narrative Peer Review Report is attached as Appendix 7.

Essentially the questions that the Peer Reviewers are asked to address are the following:

- Does the Self Study present an accurate picture of the organization's education abroad operations and programming?
- Does it outline an effective strategy for improvement?
- How do the organization's education abroad operations and programming stand in relation to the Forum Standards or does its plan for future development provide a strategy for meeting the Standards in the future?
- Have the queries been addressed adequately and accurately?

The Peer Review Report should be short, concise and to the point. It should not include material such as:

- Philosophical statements about education abroad.
- Detailed narrative of the visit itself (the site visit schedule will be included as an appendix).
- Discussion of the perspectives of team members concerning various education abroad issues that may arise.
- Boilerplate concerning the organization or its programs.
- Descriptions of the characteristics of countries, cities, etc.
- Comments—positive or negative—about individuals.
- Meals and other courtesies extended to the visiting team. (If the Peer Review Team wishes to thank people for items such as these, they should do so in a separate correspondence.)

L) The Follow-up Worksheet

Along with this Guidebook, a Queries and Follow-up Worksheets will be distributed. The Follow-up Worksheets should be completed by the Peer Reviewers and returned to the Forum office electronically. The Follow-up Worksheet should be used to comment on the organization's Queries Worksheet and provide improvement-oriented action suggestions.

Below is an example of the Queries Follow-up Worksheet.

Follow-up Worksheet
STANDARD 1
MISSION: THE ORGANIZATION HAS A FORMALLY ADOPTED MISSION STATEMENT FOR IT OVERALL OPERATIONS AND FOR ITS INDIVIDUAL PROGRAMS THAT IS KNOWN TO AND ACCEPTED BY ITS FACULTY AND STAFF.

a. Mission and Commitment: The organization has mission statements appropriate for each Program.

Standard.Query	Query	Comments	Recommended Actions
1.a.i	Does the organization have a mission statement for its Programs? If so, what is it?		
1.a.ii	Does each Program have clear objectives?		
1.a.iii	Does the organization clearly define expected outcomes?		

M) Template for the Narrative Report

Peer reviewers should use the template in Appendix 6 for the Narrative Report. The template is also distributed electronically along with this Guidebook.

N) Resources: Forum Web Site, The Standards Toolbox, Staff

Peer Reviewers should feel free to consult the same resources available to the organization under review. Additional information about the Forum on Education Abroad, about the Quality Improvement Program, and about the *Standards of Good Practice* is available on the Forum website at www.forumea.org .

In addition, the Forum has developed an online resource, The Standards Toolbox. This resource is password-protected, and contains examples of best practices in education abroad through documents and hyperlinks submitted by Forum members. The Standards Toolbox is structured so that links to examples of best practices which directly relate to the *Standards* and Queries appear alongside the text of the Standards and Queries themselves.

Online resources meant especially for QUIP reviews will also be made available through the Standards Toolbox.

The Forum staff is always available for consultation for any type of question or concern, via email (forumea@dickinson.edu) or by phone: 717-245-1031.

VI. Glossary of Terms

Accreditation: A formal process, usually carried out by a government agency or an association specifically authorized to conduct accreditations, designed to attest to an organization's worthiness with respect to specified professional standards. QUIP is not an accreditation process.
Appendix: Any documents that the organization under review wishes to submit in addition to the Self-Study Report and the Queries Worksheet. Appendices can be submitted in electronic or hard copy. If submitted in hard copy only, five copies of each are required.
Boilerplate: General published or electronic material about the organization in general or about the education abroad programs. Any hard-copy boilerplate materials should be submitted in 5 copies.
Certification: An evaluation, usually of an individual, designed to officially state that the individual is qualified to perform some professional function. QUIP does not include any certification processes.
Compliance Review: A review designed to show that an organization fulfills certain specified conditions. QUIP is not intended as a compliance review
Confidentiality Agreement: A statement signed by Peer Reviewers agreeing not to disclose anything learned while reading the Self-Study or conducting the Peer Review or Site Visit.
Conflict Of Interest Statement: A statement signed by Peer Reviewers declaring any conflicts of interest known to them and agreeing to disclose any conflicts of interest that they may become aware of subsequently.
Constituent: Any individual or organization that participates in the activities of a program or benefits from them.
Curriculum Vitae: A document showing the education, work activities, professional activities, publications, etc. of an individual Also known as a resume.
Education Abroad: Studying in another country; in the Forum context, this refers specifically the experience of undergraduate US students abroad.
Education Abroad Program: An academic program involving study, experiential programming, internships, research, and/or other educational activities in a formal setting in a country other than the home country of the students.
Final Letter: The letter sent by the Forum Review Panel to the organization under review at the conclusion of the QUIP process.
Forum Board of Directors: The Governing Body of the Forum on Education Abroad.
Forum Council: The elected body responsible for the Forum's program activities.
Forum On Education Abroad: A not-for-profit, non-governmental membership organization founded in 2001 for the purpose of promoting the interests of the education abroad field. The Forum is incorporated in Pennsylvania and Delaware. Its voting members are organizations. Collectively the member-organizations of the Forum account for more than 60% of the US students who participate in education abroad each year.
Forum Review Panel: A committee of education abroad professionals appointed by the Forum Council and Board of Directors to officially state the results of each QUIP review. Typically two members of the Panel will be assigned to read the Self-Study and Peer Review Reports, and draft the Final letter.
Follow-up Worksheet: An Excel worksheet which the Peer Review Panel completes, commenting on the items included in the organization's Queries Worksheet. (See also,

Queries Worksheet. The Queries Worksheet and the Follow-up Worksheet are keyed to each other row by row.
Guidebook: A copyrighted publication of the Forum containing instructions and suggestions for organizations and for Peer Reviewers and templates for the reports.
Learning Objectives: A statement of what students are expected to learn in a program or specific course.
Organization: In this context, a college or university, third party provider or any other organization that provides, operates or manages education abroad programs. The organization at times referred to as 'the organization under review.'
Organizational Representative: The person designated by the organization as the individual in charge of the Self Study. The primary contact for the Forum and primary liaison with the Peer Reviewers.
Peer Review: An assessment of the Self-Study performed by a team of impartial education abroad professionals not affiliated with the organization.
Peer Review Report: The formal report written by the Peer Reviewers after the Site Visit. The Peer Review Report consists of a Narrative Report and the completed Follow-up worksheet.
Peer Review Team: Typically two peer reviewers who visit the organization and its programs and write the Peer review Report.
Peer Reviewer: An impartial education abroad professional appointed by the Forum to review an organization's Self-Study.
Pilot Project: The first implementation of the Forum's review procedures, which took place in AY 2005-2006.
Quality Improvement Program (QUIP): The Forum program designed to help organizations improve the quality of their education abroad programs and services, based on the *Standards of Good Practice for Education Abroad* first promulgated in 2004 by the Forum.
Queries: A set of questions that accompany the *Standards of Good Practice for Education Abroad* allowing an organization to provide substantial detail concerning its approach to each of the Standards
Queries Worksheet: An Excel worksheet distributed to the organization under review which the organization uses to provide answers to the Queries and to detail plans for future development.
QUIP: See ***Quality Improvement Program***
Self-Study: The process undertaken by the organization under review to assess its programs and services, specifically in relation to the queries provided in the *Standards of Good Practice for Education Abroad*.
Self-Study Report: The formal report filed by the organization at the conclusion of the self study process. The report consists of a form,. a narrative, and the completed Queries Worksheet.
Self-Study Team: The representatives of the organization who lead the Self-Study process.
Sending School: A college or university in the United States that sends one or more students to an education abroad program run by another organization.
Senior International Officer: The highest ranking individual on a campus who has overall responsibility for international programming activities.
Site Visit: A visit to an organization under review or to an individual program by a team of Peer Reviewers.
Site-Visit Information Packet: A packet of information prepared by the self-study team for the peer reviewers providing practical information for the visit.

Stakeholder: Any person or organization that has an interest in the success or failure of the organization being reviewed.
Standards Development Organization (SDO): An official designation given by the US Department of Justice to an organization that it recognizes as the official voice of a particular field or endeavor regarding standards of good quality. The Forum has been designated as a Standards Development Organization for education abroad.
***Standards of Good Practice for Education Abroad*:** A set of standards developed by the Forum and endorsed by many US colleges and universities.
Standards Summit A meeting held at Dickinson College in November 2006 to review the experience of the Pilot Project and to discuss recommendations for the future implementation of the QUIP. Representatives of organizations that did self-studies and Peer Reviewers participated in the Summit.
Syllabus/syllabi: A document setting forth the content and other parameters of an individual course.
Team Leader: Person responsible for either the Self-Study or Peer Review processes.
Template: A Word document containing headers for a report. There are templates for both the Self -Study Report and the Peer Review Report.
Third Party Provider: An organization that manages (runs) education abroad programs for students other than its own.

APPENDIX 1
Forum on Education Abroad
Quality Improvement Program (QUIP)
Self-Study Report

APPENDIX 2: Sample Narrative Self-Study Report
Permission pending

APPENDIX 3
Sample Organizational Response to the Peer Review Report
Reprinted with permission from the Institute for Study Abroad – Butler University

The Institute for Study Abroad, Butler University (IFSA-Butler) has been pleased to be involved in the pilot process of the Forum's Standards of Good Practice. While it has been time-consuming, the process of the self-study, the peer review, and the evaluation of the outcomes and future improvements have been eye opening and beneficial for the Mérida program and IFSA-Butler as an organization.

In a pilot process of this kind it was difficult in the self-study and site review to include a balance of the direct enrollment model and IFSA-Butler program courses, along with the oversight of the head office in Indianapolis and local director. We have always thought that our services and student integration were outstanding and appreciate and agree with the comment from the reviewers that "this program shines." In fact in doing this review we learned quite a bit as an organization and have found better ways to communicate and share information with our Mexican resident director.

There are a number of suggestions that the reviewers have made and we appreciate their feedback.

- We are currently looking at many aspects of our IFSA-Butler webpage and advising and will take the reviewers suggestions on website changes and advising in making updates.

- We have just finished our first year of outcome oriented student on-line evaluations. The process brought us a large amount of data and many ways we can look at restructuring programming models to support the students' needs and valid outcomes. In January we will be adding onto the evaluation with a section on student learning and language outcomes.

- IFSA-Butler has always had a policy of not allowing staff to transport students in personal vehicles, but as the reviewers pointed out, this needs to be reconfirmed again with all staff. This also brings up the issue of the fine line between U.S. and Mexican policy and ethics and a review of training with all staff and faculty abroad with sensitivity to the balance of US and local cultures will be considered.

- The overall academic review of the program courses in Mérida is in the process of being reworked and implemented; therefore we were not surprised by some of the concern and questions. In the past year we have developed our own LAAC (Latin American Advisory Council) and have used them in various ways. Given this review we will work with the LAAC in the future to review the program courses. This group does consist of faculty members and their oversight would involve on-site review for program courses. The other areas of faculty qualifications and faculty evaluation are touchy subjects, but can also be addressed by this group and with the Resident Director in a reasonable manner.

- The specific comments involving student conduct, judicial procedures, and grievance procedures are useful. Fortunately we have had fewer student problems since 2001 when we published our guidelines in a NAFSA publication toolkit. We have had more study abroad advisors indicating on the approval form when students have been on judicial probation. We review these situations closely and have rejected students or sent letters to students indicating that the past behavior will not be tolerated on our program.

Our resident directors work closely with the Indianapolis office if there are problems and issues with students. Whenever possible we find a way to support the student without compromising the experience for the other students or the reputation of IFSA-Butler with the overseas university. Due to our direct enrollment model, we typically follow the standard behavior procedures of the host organization in addition to the rules stated in our student program contract. We have worked closely with our legal counsel to find the right balance of procedures for our protection and the student's welfare and our conduct information is also listed under admission guidelines on our website, application, and catalogs.

We appreciate the hard work and dedication of the IFSA-Butler staff who worked as the core review team. The IFSA-Butler Board of Directors and IFSA Foundation have supported our efforts and the field's efforts in the setting of standards of good practice for the field of international education and we appreciate their support and financial assistance for IFSA-Butler and the Forum.

The Forum staff, peer reviews, and standard committee members have all worked diligently to move the standards of good practice into a concrete process. IFSA-Butler appreciates the suggestions and outside view that this process has given us and we look forward to continuing ahead in future with the QUIP process.

APPENDIX 4:
Confidentiality/ Non-disclosure Form

Confidentiality/Non-Disclosure Form

_____________________________(“The Discloser”) and
_____________________________(“The Recipient”) agree:

Discloser may from time to time disclose to Recipient certain confidential information or trade secrets generally regarding __________________________________.
The Recipient agrees that it shall not disclose information so disclosed, unless in conformity with this agreement. Recipient shall limit disclosure to the officers and employees of the Recipient with a reasonable “need to know” the information and shall protect the same from disclosure with reasonable diligence.

As to all information which Discloser deems is confidential, Discloser shall conspicuously label the same as “confidential,” “not to be disclosed, ” or with other clear indication of the status of the information. If the information which Discloser is disclosing is not in written form, for example a device, Discloser shall be required to, prior to, or at the same time, provide notice in writing of the secrecy claimed by Discloser. Recipient agrees upon reasonable notice to return of the confidential material provided it by Discloser upon reasonable request.

The obligation of confidentiality/ non-disclosure shall terminate when and if any of the following occurs:

a. Confidential information is made known to the public without fault of the Recipient; or
b. The information is disclosed publicly by the Discloser; or
c. The information loses status as confidential through no fault of the Recipient.

In any event, the obligation of confidentiality/non-disclosure shall not apply to information which was known to Recipient prior to the execution of this agreement.

___________________________________ ______________________
Signature of Discloser Date

____
Name of Discloser

____________________________________ ________________________
Signature of Recipient Date

____
Name of Recipient

APPENDIX 5
Conflict of Interest Form

The Forum on Education Abroad
Disclosure of Conflict of Interest

1. I hereby certify that I do not hold any position, affiliation or material financial interest, direct or indirect, in any entity as described in Section B.4. of **The Forum on Education Abroad Conflict of Interest Policy** except as follows:

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2. I hereby certify that I am not engaged in, or expect to be engaged in, any other activities that might be regarded as a conflict of interest, except as follows:

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3. I hereby certify that I have not accepted gifts; valued at more than $100; gratuities; or entertainment that might influence my judgment or actions concerning the activities of The Forum on Education Abroad, except as follows:

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4. I hereby agree to report promptly, in accordance with Section B.4. of **The Forum on Education Abroad Conflict of Interest Policy**, any additional matters which may develop or come to my attention within the scope of the policy between now and my next annual disclosure.

____

Position Title_______________________

Date: ________________________

APPENDIX 6
Forum on Education Abroad
Quality Improvement Program (QUIP)
Template for the Narrative Peer Review Report

APPENDIX 7
Sample Narrative Peer Review Report
Excerpted and reprinted with permission; to protect its identity, the name of the institution has been replaced by "The Institution" and identifying details have been masked or deleted

[..]This report summarizes the information from the Self-Study and Site Visit and relates this information to the *Standards of Good Practice for Education Abroad*, as published by the Forum.

I. ASSESSMENT OF THE ORGANIZATION'S SELF-STUDY REPORT

In reviewing this self-study material, the team has reached the following general conclusions:

1. The Institution has a realistic sense of the challenges its faces and the strengths and weaknesses the organization brings to meeting these challenges. As the peer reviewers looked at The Institution, they found no major challenges or issues that were not already being addressed, to some degree or another, by The Institution. For example, The Institution always will need to find, train, and retain good Site Directors. This became obvious very early on in the interviews, largely because The Institution's staff is well aware of this ongoing challenge and has been addressing it for many years.

2. The Institution's self-study appears to be an honest and open evaluation of the programs involved. In the case of the evaluations of the specific programs, there seemed to be no area that was not openly and thoroughly evaluated. The Institution has shown that it takes the self-study process seriously and that it has the will to ask difficult questions and to follow the information wherever it might lead.

We would like to mention here a number of the specific topics brought up over the course of our visit:

A. Direction

The Institution enjoys a particular niche within the field of US study abroad, and hopes to strengthen its leadership role in the international education community. The Institution wants to shape the field of international education through public diplomacy, reciprocity agreements or actions in the countries where they have programs, continued participation in professional conferences and organizations, and more active involvement with their alumni.

B. Legal compliance

The organization now requires compliance with all relevant laws in each country in which The Institution operates. This has meant finding specialists in the US and on-site who can advise the organization on legal norms regarding banking and accounts payable, equipment and facilities, health, housing and housing contracts, labor (including benefits, hiring, payroll), liability, safety and security (including emergency response and disaster planning), taxes, visas, and so on. The goal of systematizing and organizationalizing The Institution's approach to these issues implies a move away from reliance on a Compliance Team, so that each relevant office at The Institution can oversee its areas of expertise on each program.

The Institution is compiling an internal online database re: compliance. This will provide local and home-office staff a resource for evaluating and maintaining compliance on all topics mentioned above, and for updating as laws evolve.

In some cases, US labor laws apply to Academic Directors but not local staff, especially where Site Directors are US citizens. However, each country's laws are unique and in all cases The Institution seeks to abide by local labor regulations and Site Directors are also subject to those laws; The Institution has specific compensation policies and benefits for Site Directors.

B. Internet

At The Institution's locations throughout the world it has not yet been possible to standardize internet access at all programs. In some cases, students and staff have consistent access to high-speed internet through the program or local internet cafes; in other cases, programs must depend on less reliable service. While The Institution is working to provide site staff with more resources online, it also recognizes that this system will not yet work for all programs. Regional collaboration and local solutions often must be sought by on-site staff. This affects not only email communication between students and their parents, friends, and professors back home, but also program business, access to The Institution library and other online resources, accounting, and other areas. In some cases, purchasing computer hardware and support locally increases technical support available to the programs. In this area, in other words, outsourcing and locally-appropriate solutions are more appropriate than a centralized system.

Building an IT structure that will allow equal access is both a challenge and a goal for The Institution. While the programs emphasize student immersion in local conditions, some access is essential for academic progress and administrative function. Academic Directors have some latitude in how far they go toward one extreme or the other, but there are not yet enough avenues for site staff to weigh in on their IT needs and preferences. This is beginning to change, and The Institution will have to develop resources to follow up on site staff requests and suggestions.

C. Participants

Fully fifty percent of The Institution students come from 25 sending universities and colleges (nearly half of these from just 10 schools). There are approximately 74 schools overall with whom has direct payment arrangements. It also has close relations with several more. Stability of future programs might suggest the need to broaden this base.

The Institution discussed the need to establish better ongoing contact with program alumni. Past participants can take part in conferences, where they share and present the knowledge gained on the program, but few opportunities exist for The Institution staff to follow up with those who have finished the study-abroad programs. Greater commitment to maintaining contact with returnees could provide several additional benefits: feedback, financial support, support with advertising programs, and research on how participants have continued the work begun abroad (e.g., through senior theses and thematic coursework, or continued study of the language, country, or region in which the program took place).

D. Staff

The Peer Review Team heard many comments regarding the need for more training, both of Site Directors and of other on-site staff. Such comments referred variously to accounting and bookkeeping, emergency management, The Institution's model/ethos, working with American college students, language teaching, IT, compliance issues, and so on.

We discussed at great length the role of the Site Director positions. In many ways, these directors carry much of the work of the organization, since they are The Institution employees who deal most directly with students as well as with the home office, and who can guarantee the success or failure of particular programs. Importantly, in many cases The Institution Academic Directors also serve as the US State Department Warden for their areas or countries.

E. Programs

Several of the Directors emphasized that the focus on program expansion is oriented more toward enriching existing programs than toward increasing the number of students or the creation of new programs. Other comments made throughout the visit, however, suggested a push toward creating new programs, especially to take place in the summer and/or to meet the needs of engineering students and other disciplines not as frequently represented in study abroad. Each new program takes some three years to develop. The Peer Review Team also heard several mentions of Faculty Engagement, but were not able to determine The Institution's definition of this concept. By the same token, reciprocity is a concept The Institution takes seriously but is, in some arenas, just beginning to explore. Both topics may include helping US and host-country faculty with research, for instance, but The Institution seems to be in the beginning stages of establishing ways to provide these services. The Peer Review Team looks forward to seeing development on these fronts.

F. Advising

The Institution relies heavily on its own study abroad advisors to counsel prospective participants. These advisors handle the first calls to the organization and are thus a key element in the success of the programs. Advisors receive training and have some opportunities to make site visits; all have had some significant international experience. Advisors are supervised by regional Directors, all of whom also have significant international experience. As with the Site Ditectors there is concern that these advisors be sufficiently well-trained, especially in dealing with parents, emergency situations, and FERPA issues.

G. Marketing

In several of the peer review team's meetings, comments were made regarding the need for marketing material that is up-to-date and consistent across programs.

II. ORGANIZATIONAL STRENGTHS AND WEAKNESSES

A. Strengths

1. The Institution's program model provides guidance on where and how to spend resources, what types of employees to hire, and where to build new programs, taking into account that the model may need to be adapted in some settings. It also helps focus the training of academic directors and the pedagogy used in courses. The program provides applicants access to a broad spectrum of countries.

   The Institution's extensive international experience signifies an immense amount of organizational knowledge. Because of this, The Institution is well-prepared (and working to become even better-prepared) to deal with the wide variety of security, health, and student relations issues that arise in dealing with students abroad. Moreover, the diversity of programming provides a hedge against rising or falling demand for programming in any one area of the world. As demand for international programming in certain areas of the world will fluctuate, having a diverse range of programming will protect The Institution from some of these fluctuations. At the same time, this experience also equips The Institution to take advantage relatively quickly of new areas of interest. The challenge, of course, is to be able to disseminate this collective wisdom across the organization and especially to new hires. The Institution addresses this daunting task through active training of its home office staff and its Site Directors. It has also produced a series of printed policies and handbooks.

2. The program allows students to do in-depth work on a topic of interest, integrating various mechanisms (language study, homestay, course work, and independent study) for learning about the society in question. Few programs provide students the chance to carry out independent research, and few are so well-placed to assist in this process. At the same time, the cohesive nature of the program model enables students, at least in theory, to engage a particular set of questions in greater intellectual depth than might be common in a standard university-based semester abroad (or at home).

3. The quality and background of The Institution staff is directly related to the depth and quality of student experiences, as well as to staff ability to support students going through several varieties of culture shock. Many staff members had significant international experience before joining the organization, and most of those who did not can address relevant issues through The Institution training process. Increasing numbers of Site Directors have PhDs or relevant local terminal degrees, and increasing numbers are host-country nationals, further deepening student interaction with their host country.

4. The organization's move toward compliance, while difficult and as yet incomplete, nevertheless signals several positive things. It implies a crucial level of respect for the host countries in which The Institution works, and for the staff who are host-country nationals. It promises to provide a degree of uniformity and the consequent smoothing of administrative processes, which will facilitate many aspects of the overall organization's work. It certainly will give The Institution essential protection from liability. Finally, it indicates the organization's ongoing commitment to serving as a leader in the field of international education

B. Weaknesses

1. The Institution's primary challenge is to maintain quality across its numerous programs, each with a different legal, academic, health/security, and cultural context, and each with Director bringing individual strengths and weaknesses. Given this number of variables, it is perhaps an impossible task to guarantee that every program offered will be of the same quality.

   While this challenge is real, the peer reviewers recognize that it is almost certainly an unavoidable element of running a wide-reaching international concern. As such, it needs to be balanced by two facts. The first is that The Institution recognizes this challenge and commits considerable resources to dealing with it. As noted above, training of The Institution employees comprises an important component of the organization's work; there is talk (for which we encourage follow-through) of establishing even closer supervision of the Directors through more on-site visits and home-office oversight. The second is that, despite the fact that these programs are imperfect, student participants are, in their own judgment, having powerful international experiences that are academically and personally challenging and that will certainly have a positive effect on their lives. This should weigh heavily in any analysis, since The Institution's ultimate goal is to provide such experiences; the Peer Review Team aims to balance its discussion of The Institution's short comings with the fact that The Institution is doing a great deal of good.

2. The Peer Review Team finds that many of The Institution's language courses do not provide students with sufficient skills to carry out their independent study projects in the host language. While this may be unavoidable in the context of languages not taught at the home schools, The Institution might consider alternative routes to language development in some of its programs: a focus on colloquial language as spoken in the host country might, for instance, provide participants an excellent and unique opportunity to understand the country and culture through study of how a colonial language has been adapted to the local context. The model often does not provide students with enough hours of instruction in grammar and vocabulary to develop usable skills. To its credit, The Institution does not advertise its program as primarily language acquisition programs (except in the rare cases when they actually are), but recognition from home-school faculty may depend on providing a more substantial language component, particularly in relation to students' ability to carry out meaningful independent research.

3. Library resources (online and onsite) are, in the view of the Peer Review Team, often insufficient. Taking into account the nature of The Institution programs, it is nevertheless important to have resources available onsite, and the budget for library purchases is insufficient. While online resources provide increasing opportunities for students to carry out research, this is highly dependent on what the local context can support from an IT standpoint; perhaps the organization can look into portable resources on DVD and CD-ROM for some of its more remote sites.

4. The growing demand for shorter programs presents The Institution with a particular challenge. Can The Institution adapt its model to a shorter program length without losing the cultural interaction and depth of the longer programs? This is especially a concern when one considers students' need for language training in order to carry out Independent Study Projects or have a successful home stay. The Institution has, of course, already created a number of summer programs, and it will be interesting to see whether these programs add to the strength of The Institution's offerings or dilute the model.

III. RECOMMENDATIONS: Areas for Quality Improvement

The Peer Review Team suggests several areas for quality improvement, and notes that these are, in some cases, areas in which The Institution is already working to improve. They are as follows:

1. Strengthening of language courses. This might take different paths in countries whose languages tend to be taught at US universities and in those whose languages do not.
2. Training of non-Director onsite staff should be increased. This is something The Institution seems to be considering doing via increasing the number of regional managers and of site visits by US-based staff, as well as by offering more opportunities for intra-regional cooperation and communication.
3. Improvement of library resources (see above).
4. Continuation of moves toward legal compliance in each country in which the program is based.
5. Finding an assessment instrument that will provide the data necessary to insure quality programs as well as the information needed for rational business decisions.

Along with this, there needs to be a mechanism by which data collected can be disseminated to those who can most effectively use it.

6. Increase in efforts to reciprocate, offering services and support to faculty and others in host countries and, in some cases, at US organizations.

SUMMARY: The Institution's study abroad programs are varied and rich, They present a complex picture for a peer review team, and one well worth studying in great detail. We very much enjoyed the opportunity to speak with our colleagues, and look forward to following its future development.