isa

EDUCATION ABROAD OPERATIONAL MANAGEMENT:

Strategies, Opportunities, and Innovations

A REPORT ON ISA THINKDEN

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ISA offers high-quality education abroad programming in Africa, Asia, Europe, Latin America and the Pacific, providing a range of study, internship and service-learning opportunities. Since 1987, ISA has facilitated cultural discovery and learning through partnerships with distinguished host institutions and through our knowledgeable team of resident directors. ISA staff members, in the U.S. and abroad, aim to ensure that all students achieve maximum intercultural learning and fulfill their personal goals throughout their education abroad programs. ISA seeks to support all professionals in the field of education abroad and hope this publication proves to be a useful resource.

Table of Contents

Acknowledgements

Introduction

As funding allocated in support of higher education in the U.S. has gradually declined or remained stagnant in recent years, education abroad professionals report that they are facing growing challenges with securing adequate resources. Education abroad directors around the country are assertively benchmarking funding practices and pursuing new and expanded approaches to sustain and/or enhance their education abroad operations. Although practical resource guides on education abroad office and program management are widely available, sophisticated references on pursuing entrepreneurial strategies and innovative approaches to securing sustainable operational funding are limited.

In response to this growing need, ISA provided an interactive forum for education abroad professionals to critically discuss the themes of entrepreneurship and innovation in education abroad operational management, with the goal of generating new ideas and considerations in support of advancing professional knowledge and best practices.

Based in Denver, Colorado, ISA's University Partnerships division facilitated a forum modeled on the idea of a modern think tank, wherein all participants would substantively contribute, by either moderating a discussion, serving as an expert panelist, and/or facilitating a breakout discussion. ISA engaged Dr. Anthony C. Ogden, a respected professional with nearly 25 years of experience in education abroad leadership, to assist in the development

and facilitation of what soon emerged as, "ISA ThinkDen 2018."

The inaugural ISA ThinkDen forum was held July 18-20, 2018 on the campus of the University of Colorado at Boulder, where a number of senior education abroad professionals came together for intense discussions focused on the theme: Innovation and Entrepreneurship in Education Abroad Operational Management. The specific goals of ISA ThinkDen 2018 were to:

- explore new and alternative approaches to ensure sustainable education abroad operations into the future;

- assess standard practices and new approaches that can be utilized strategically to enhance education abroad operations; and

- provide a framework for understanding the range of operational funding models and strategies, and the application of those approaches across differing institutional contexts.

ISA ThinkDen 2018 featured open discussions on topics such as capitalizing on education abroad trends and maintaining transparency and ethical standards in contemporary education abroad programming. Smaller breakout sessions focused on specific topics, such as the utilization of data for strategic planning and innovations in the financial management of faculty-directed programs. Short presentations were leveraged to focus on management strategies, such as lean process mapping

and a process known as 360° advocacy to senior administration. Participants were invited to critique common operational funding models, explore alternative revenue streams, and consider new directions in external collaboration and partnership. Overall, ISA ThinkDen 2018 provided an ideal forum that led to thoughtful and candid discussions on what it means to be innovative and entrepreneurial in U.S. higher education today.

Written collectively by ISA ThinkDen 2018 participants, this report features a compilation of short articles based on the discussions held over the course of the gathering. Also included are brief articles written by Anthony Ogden that were featured on ISA Today[1] as pragmatic pieces leading up to ISA ThinkDen 2018. The content of this report does not necessarily reflect the views or positions of ISA and should be received and consulted as a professional peer reference on the topic of innovation in education

abroad operational management. In creating this report, ISA hopes to encourage similar discussions in education abroad offices across the country.

ISA would like to thank all those who participated in ISA ThinkDen 2018 and made this report possible. We look forward to receiving your comments and, above all, to your participation in forthcoming discussions.

Anthony C. Ogden, Ph.D.
Lauren M. Alexander
Eric Mackintosh, Ph.D.
Editors

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1 ISA Today, https://isatoday.wordpress.com/

ISA ThinkDen 2018 Survey

In preparation for ISA ThinkDen 2018, ISA invited all members of the current ISA Academic Advisory Board[2] and all participants of ISA ThinkDen 2018 to complete a short survey focused on funding and financial models for education abroad operations. The intention of the survey was to further orient the ISA ThinkDen 2018 discussions around a broader understanding of the pervasive challenges facing education abroad operational management today.

The ISA survey aimed to build upon the helpful findings of the Forum on Education Abroad State of the Field survey (Forum, 2017). The State of the Field survey asked about the relationship between rising costs and/or declining resources in relation to changes in education abroad programming. Thirty-eight percent of the respondents indicated that changes in costs and resources have affected education abroad programming decisions. Moreover, 82% indicated that their education abroad offices are funded, at least in part, by the home institutions' general funds and almost half (49%) of respondents reported that their offices receive funding from student fees paid by education abroad program participants.

The 14-item ISA ThinkDen 2018 survey was administered in June 2018 to 35 education abroad directors from around the country. Respondents (n=17) represented a diverse array of institution types and sizes, although the vast majority (82%) were from public institutions where faculty-directed programs are most popular. Although much smaller in scope, the ISA survey results nonetheless echoed findings from the Forum's 2017 State of the Field survey, in the following ways:

- Education abroad enrollment is continuing to grow. Over 65% of respondents indicated that their respective education abroad enrollments are higher than the previous year.

- Many education abroad offices rely on a combination of funding sources. Over 41% reported to relying on a combination of self-generated revenue and centralized funding.

- Most education abroad offices allow annual fund balances to carry forward across fiscal years. Approximately 70% allow all or a certain percentage of fund balances to carry forward across fiscal years. Only about 12% are prohibited from carrying forward any portion of fund balance returns.

- It is de rigueur to advocate to senior institutional leadership for funding. Over 70% of respondents regularly turn to senior institutional leadership with funding requests. Alumni and donor outreach (53%) and grant proposal writing (47%) are also common ways to generate operational revenue.

- Staffing is the top funding priority. Almost all respondents indicated that personnel and staffing needs are among their highest priority, followed by staff professional development (41%) and marketing and advertising (41%). None indicated research as a funding priority.

Looking to the future, 88% of the survey respondents indicated that their respective offices need to be more engaged in innovative and entrepreneurial activities that support and sustain essential operations. Yet, the majority (70%) continue to look to their home institution as the primary source for financial support. Few are optimistic about expanded federal or state-level support for education abroad programming. Perhaps related, nearly half of the respondents (47%) anticipate increasing student fees in the next year, if only to sustain current levels of operations. Many also report to have begun exploring external grant support, building external partnerships, and boosting alumni and donor outreach.

As indicated by the 2018 Open Doors report recently released by IIE, education abroad has experienced sustained growth for over 25 years and further growth is to be expected as education abroad moves from the margins of undergraduate education toward becoming a recognized and increasingly valued high-impact educational practice. Yet, many education abroad offices report that institutional funding needed to support education abroad programming is not keeping pace with the growth. The ISA survey results suggest that although many education abroad offices have long relied on internal funding sources, this may be changing. The majority of respondents appear to have begun to embrace the ideas of entrepreneurship and innovation to support and sustain essential operations. Some are turning to external sources of support and others are pursuing new partnerships that should enable them to maintain their current level of operations. Whatever the approach, the ISA survey clearly underscores that many education abroad professionals around the country are actively seeking new ideas and innovative strategies to ensure continued success.

88%
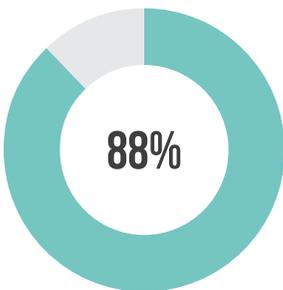
Education offices will need to be more engaged in innovative and entrepreneurial activities that support and sustain operations.

71%
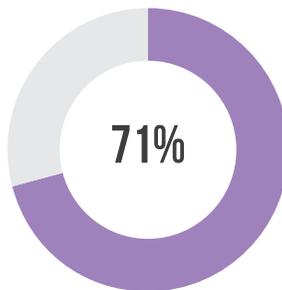
Adapting to changing priorities. Embracing new language and overarching purposes for education abroad.

47%
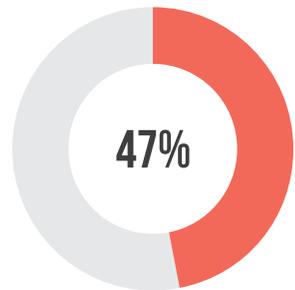
Anticipate increasing student fees to sustain current operations.

2 ISA Academic Advisory Board, https://studiesabroad.com/advisorsAndFaculty/study/advisory-board

Creating a Culture of Innovation and Entrepreneurship Within the Education Abroad Office

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Christopher Glass, Ph.D.: Old Dominion University

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Entrepreneurial leadership is in high demand. According to the ISA ThinkDen Funding Model Snapshot Survey, 88% of respondents agreed that offices will need to be more engaged in innovative and entrepreneurial activities that support and sustain operations. Moreover, entrepreneurship is consistently ranked among the top five essential qualities needed among senior international officers (Association of International Education Administrators, 2017). This is further made evident in job postings that regularly use language that explicitly specify the need for candidates to possess strong entrepreneurial skills and a willingness to seize emerging opportunities.

While the demand for entrepreneurial leadership is certainly pervasive, the idea of 'entrepreneurship' itself defies easy definition. The traditional definition of entrepreneur refers to people who "organize, operate, and assume the risk for a business venture" may be too narrow (American Heritage dictionary of the English language, 2015). While entrepreneurial leadership in education abroad relates primarily to business operations, it also taps into the innovative spirit that is inherent in the work itself. In this article, the context for entrepreneurial leadership in education abroad is discussed in context of emerging trends that necessitate entrepreneurial leadership and their implications for education abroad operations. Two institutional case studies are offered to illustrate varying approaches to pursuing entrepreneurial leadership in education abroad operations.

Education Abroad and Entrepreneurship

Innovation has always been essential to effective leadership in higher education. The education abroad profession has long attracted creative and passionate people who bring new initiatives and programs to life. Today, entrepreneurial leadership requires more than building a portfolio of programs; entrepreneurship is necessary for sustainable operational management. There are a number of external factors that drive education abroad professionals to become more entrepreneurial:

- Uncertain Funding. Revenue generation has been a top priority among international educators for decades (AIEA, 2017; Helms & Brajakovic, 2017). The emphasis on financial sustainability is not new, but it has become more acute due to the steady decline of public funds, which, in turn, requires new funding streams to replace declining state subsidies. In a recent study, 70% of international educators indicated that maintaining funding for campus internationalization as

a chief priority (Glass & Lee, 2018). Moreover, the outlook for expanded state and federal support of education abroad is bleak: according to the ISA ThinkDen survey, no respondents believe that additional state funding will be allocated and only six percent were optimistic about federal support (ISA, 2018).

- National Enrollment Trends. Institutional leaders are also responding to larger demographic shifts affecting higher education enrollment trends. In the past five years, the total number of U.S. college students has declined by almost two million students, such that over one-half of public universities have been unable to meet their enrollment targets (Hoover & Lipka, 2016). With fewer students, educational abroad leaders, especially at smaller institutions, are expected to face funding shortages and enrollment challenges that could threaten the sustainability of education abroad programs.

- Expanding Education Abroad Access. Expanding access to education abroad remains a priority among institutional leaders. The increase in the total number of students who education abroad has been fueled by a new emphasis on international internships, service-learning, and research abroad. Although the proportion of U.S. minority students studying abroad has increased, innovative thinking and entrepreneurial funding models are often needed to ensure that education abroad is accessible to first-generation and underrepresented students (Engel, 2017).

As previously mentioned, entrepreneurial leadership draws upon the innovative spirit that is largely present among many who work in international education. Education abroad leaders, in particular, already do much of what effective entrepreneurs do: they ask questions, take a multidisciplinary approach to solve problems, experiment with new methodologies, and cultivate a network of people with different perspectives (Dyer & Gregersen, 2009). A recent study by Glass & Lee (2018) that looked at entrepreneurship in education abroad leadership identified the following five behaviors perceived to be essential to successful education abroad leadership (Glass & Lee, 2018).

1   Building support from senior administration

2   Creating a strategic focus for international initiatives

3   Developing strong partnerships with providers

4   Retaining and cultivating a senior leadership team

5   Communicating effectively with faculty

Glass & Lee (2018) found that even at institutions where institutional funding was thought to be inadequate, education abroad leaders who exhibited these behaviors were able to generate a sense of strategic purpose. Such leaders developed clear criteria for identifying external partners, aligned initiatives with clear rationales for internationalization, maintained high ethical standards, and developed a strategic framework from which to base their initiatives.

Entrepreneurship and entrepreneurial leadership can resonate differently across institutional contexts. What follows are two institutional case studies exemplifying two unique approaches to innovation and entrepreneurship in education abroad operations. The following questions are considered:

1 How do the ideas of innovation and entrepreneurship reconcile with an education abroad leader's understanding of U.S. higher education?

2 What does this look like across institution types?

3 What does it mean to be innovative and entrepreneurial in education abroad?

Decentralization and Innovation

THE UNIVERSITY OF MICHIGAN

The University of Michigan's (UM) highly decentralized structure inherently fosters a sense of autonomy and innovation among its individual academic units. Individual schools and colleges have the flexibility to pursue initiatives that align with their particular academic missions and disciplinary cultures. Education abroad operations follow the same structure, with each unit managing its own program portfolios and professional staff. It could be easy for education abroad to get lost among the numerous priorities of a given unit, and even easier to create uneven student opportunities across units and major fields of study. UM's response to these challenges has been to rethink the education abroad narrative at the

institution and to align it with broader goals for engaged learning, including the value of a residential higher education. The changing language also responds to the current national landscape of rising educational costs, growth in online educational providers, and renewed interest in higher education for workforce development.

> ### WHAT DOES INNOVATION LOOK LIKE AT THE UNIVERSITY OF MICHIGAN?
>
> - Leveraging where we "sit" on campus: within academic affairs
>
> - Focusing the Victors for Michigan ($4.78) fundraising campaign on global and engaged learning
>
> - Challenging the revenue-based operating model for education abroad
>
> - Empowering faculty and staff to innovate in program design
>
> - Rolling out new assessment tools to align with broader engaged learning goals

As a result of this shifting narrative, the institution has reframed the language around internationalization. In particular, UM frames education abroad as one of several pathways for students to gain what is referred to as Engaged Learning Outcomes for the Third Century (Hallman et al., 2018). Engaged learning outcomes include: creativity; intercultural engagement; civic responsibility and ethical reasoning; communication, collaboration and teamwork; and self-agency and the ability to innovate and take risks. With an overarching goal of

ensuring that all UM students develop and practice these skills, the institution positions education abroad as a core educational practice rooted in academic affairs and situated within regular operating budgets. The university has resisted a revenue-based model for education abroad programming by positioning education abroad alongside other institutionally supported initiatives, such as instructional innovation, community-based learning, and real-world interaction.

One way to visualize the UM approach is to divide this work into two general categories. First, there is the strategic narrative, which involves letting go of traditional language and rationales for internationalization and education abroad. This shift requires an entrepreneurial mindset – a willingness to embrace new purposes that align with broader institutional goals for education and funding. Second, there are the actions taken to support education abroad, maintain its healthy position within the institution, and raise the visibility

and assessment of student learning outcomes. These actions can be thought of as an entrepreneurial skill set, which also includes the choices made to continuously innovate program design, equip faculty with new tools for assessing student learning, and demonstrate the effectiveness of education abroad as an engaged learning pathway.

Finally, all of this work is situated within the institution's broader institutional context and decentralized culture. Each university and college have unique resource constraints and student needs. Additionally, all units navigate leadership transitions and stakeholder priorities that are specific to local communities and political climates. Yet, most are already applying an entrepreneurial mindset and approach to education abroad programming and development. Benchmarking and sharing best practices is essential to the education abroad profession as offices around the country adapt and change to become more innovative and entrepreneurial.
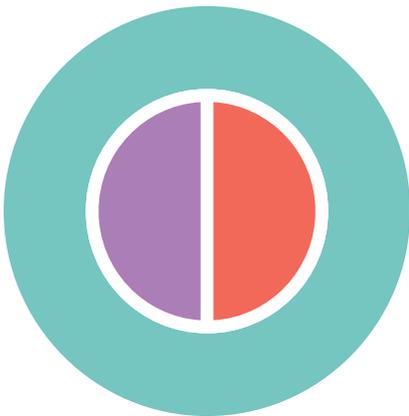
Institutional Context
Changing leadership, priorities, levels of stability.

Strategic Narrative
Adapting to changing priorities. Embracing new language & overarching purposes for education abroad.

Actions
Advocatiing for institutional support and funding. Building an evidence base for student learning. Empowering faculty and staff to continuously innovate in program design.

Innovation Through University Strategic Alignment

ARIZONA STATE UNIVERSITY

At Arizona State University (ASU), innovation and education abroad go hand-in-hand to make education abroad accessible to all student populations, as well as aligning education abroad with the larger strategic vision of the university. Targeted populations include an ever-growing ASU online learner population, a large percentage of first-generation students, Starbucks College Achievement Plan students, and other diverse groups within the institution's 106,000 student body.

For the third year in a row, ASU tops the list of "most innovative schools" in the nation, recognizing the university's groundbreaking initiatives, partnerships, programs and research (U.S. News and World Report, 2018). This national recognition comes with an expectation for all colleges, schools, and departments at ASU to do their best at innovating in their respective spaces.

Per its charter, "ASU is a comprehensive public research university, measured not by whom it excludes, but by whom it includes and how they succeed; advancing research and discovery of public value; and assuming fundamental responsibility for the economic, social, cultural, and overall health of the communities it serves[3]." As a result of this call for access, the Study Abroad Office has been charged to critically evaluate student access to education abroad programming. This led to the development of a five-year strategic plan that closely aligns the office's programs, services, and marketing efforts to the vision of the university.

The strategic plan led to the removal of nearly 100 programs that were priced higher than the ASU resident and non-resident tuition rates as well as the addition of new programs that more closely aligned with the cost of attendance. The strategic plan has similarly encouraged the Office to build new scholarship programs for first-generation students, develop new programming models to enhance access to non-traditional students, and hire additional professional staff charged with advancing curriculum integration efforts. The office's efforts to be strategic and innovative in this way has brought education abroad into closer alignment with key institutional efforts in the following ways:

- Starbucks College Achievement Plan. Through the Starbucks College Achievement Plan Partners, Starbucks has made it possible for its employees to participate in education abroad. ASU has developed specialized programs that meet the needs of Starbucks employees who are receiving their education through ASU Online. ASU's coffee and business program in Costa Rica is one example[4].

- ASU Online. With over 35,000 online degree seekers, the ASU Study Abroad Office increased communication about education abroad with ASU Online faculty, staff, and academic advisors. As a result, ASU now offers online virtual events, Skype advising appointments, online pre-departure orientations, a chat option on its website available from 8 a.m.-5 p.m. Monday-Friday, and weekly online workshops covering topics such as education abroad financing.

- PLuS Alliance. ASU students recently spent time in the Okavango Delta in Botswana studying a critically important ecosystem with some of the top experts in the world. The education abroad program is a new project of the PLuS Alliance, the two-year-old partnership between ASU, King's College London, and the University of New South Wales. The PLuS Alliance aims to combine the efforts of these institutions to solve global challenges around health, social justice, sustainability, technology, and innovation[5]. Education abroad programs, like the Botswana program, are being developed in alignment of the PLuS Alliance goals.

In many ways, ASU's culture of innovation has influenced education abroad operations at ASU, resulting in education abroad becoming more accessible to traditionally underrepresented students. This entrepreneurial and innovative environment requires the Study Abroad Office to continuously adapt, intentionally integrate new forms of technology, and pursue innovations in program development and design.

Summary

As these institutional case studies demonstrate, pursuing entrepreneurial and innovative approaches to education abroad programming and operational management is increasingly important. The following questions are relevant to understanding the current U.S. higher education landscape, navigating the idea of entrepreneurship with education abroad operations, and adopting an entrepreneurial mindset in within one's own institutional context:

Higher Education Landscape:

- What is happening in the higher education landscape that is affecting comprehensive internationalization efforts?

- How are national political rhetoric and policy changes impacting comprehensive internationalization?

- As public support of higher education shifts, what funding challenges for international efforts lie ahead?

- How are changing national demographics affecting higher education and, more specifically, trends in education abroad?

Entrepreneurship with Education Abroad:

- What are the challenges to creating a culture of innovation and entrepreneurship within the education abroad context?

- What are the different ways that innovation and entrepreneurialism are envisioned and practiced in education abroad?

- What are the most significant obstacles to implementing innovative and entrepreneurial approaches in education abroad?

- What are the consequences of maintaining the status quo?

Professional Development and Training:

- With pressures to be more innovative and entrepreneurial, how should the education abroad profession adapt?

- What training and development do education abroad professionals need?

- Are there professional boundaries to being innovative and entrepreneurial within U.S. higher education?

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3 ASU Charter, https://president.asu.edu/about/asucharter

4 ASU, Costa Rica, https://1912pike.com/sparky-and-sun-devils-costa-rican-coffee-adventure

5 PLuS Alliance, https://www.plusalliance.org

360° Advocacy for Education Abroad: Passion, Politics, and Persuasion

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Influential stakeholders exist at all levels of the organizational structure. Education abroad administrators must be able to identify these individuals and obtain their support to secure adequate budget, personnel, space and influence (e.g., seats on important committees). Nonetheless, the education abroad administrator is not the only player in the high-stakes game of campus politics.

360° Advocacy is a term used to describe intentional efforts to influence the decisions of important stakeholders within a college or university's political system with the purpose of securing support for specific programs, activities and causes. Education abroad administrators who excel in this activity can more easily acquire the resources needed to accomplish their strategic goals and objectives even within resource-constrained environments. While 360° Advocacy is a complicated endeavor, a basic understanding of six core ideas helps education abroad administrators to begin to operate effectively in this space.

STEP 1
Acknowledging Organizational Culture

Historical, legal and other factors greatly influence who wields power and influence on any given campus. Such factors also serve to shape the cultural norms and values of the institution, which ultimately influence operations. While education abroad professionals are often very knowledgeable about the cultures of the communities in which their students study, they must have similar insight into the culture of the college or university where they work. Cultivating this knowledge is the first step to developing an advocacy strategy for education abroad. Absent knowledge of the organizational culture, advocacy efforts often prove ineffective or even harmful to achieving strategic goals and objectives.

STEP 2
Identifying Stakeholders

Stakeholders represent individuals and groups affected directly and indirectly by education abroad programs and/or have the power to help or hinder education abroad. In terms of the organizational hierarchy, stakeholders are located at higher (e.g., President, Provost and Board of Trustees), equal (e.g., heads of other administrative units) and lower (e.g., subordinates) levels than the education abroad administrator. Stakeholders also include influential individuals and groups placed outside of the institution. External stakeholders may include the local consular corps, civic groups, private companies, world affairs councils, state offices of international commerce, k-12 schools and members of the media. The second step toward developing an advocacy strategy is to map internal and external stakeholders at whom advocacy efforts should be directed.

STEP 3

Understanding the Budgeting Model

The manner by which institutions allocate resources to academic and administrative units varies, as does the extent to which institutions are conservative or entrepreneurial in their expenditures. Public institutions in states where subsidies remain a significant portion of the operating budget may take a more fiscally conservative stance than institutions in states where steady declines in support for higher education have caused institutions to look for alternative sources of revenue. Similarly, some institutions prioritize funding requests that align with institutional goals and objectives outlined in a strategic plan, while others utilize a much less transparent approach. Regardless of these differences, institutions tend to administer their budgets according to one of four basic budgeting models.

It is important for education abroad administrators to understand fully their institution's budgeting model before attempting to advocate for resources. Thus, the third step toward developing an advocacy strategy is to speak with the institution's chief financial officer, budget director and other key sources of fiscal intelligence in order to understand the institution's primary funding sources, allocation processes and criteria for prioritizing funding requests.

A   **Baseline**
Funding is determined by previous allocations.

B   **Incremental**
Funding allocations are made using a predetermined formula.

C   **Performance-based**
Funding is increased or decreased based on performance.

D   **Responsibility Centered Management**
Funding is tied to revenue

STEP 4

Recognizing Sources of Persuasion

Persuasion represents the capacity to affect another's behavior. It is a particularly valuable quality for any administrator to possess given that many colleges and universities are resource-constrained organizations comprised of disparate units, each with its own agenda. Persuasion derives from two primary sources of power and fluctuates in intensity over time. The first source is one's administrative position. In this instance, an administrator may have the transactional power to affect behavior through rewards and penalties. In the case of education abroad, the perceived reward may be approval for a faculty member to lead a short-term program during the months when that individual is not on an academic contract. A perceived penalty may be the administrator's authority to suspend university-sponsored travel to a certain area due to health, safety and/or security concerns. The second source is one's personal influence. In this case, the administrator's word may hold particular sway due to that individual's unique

expertise in a certain area, personal connections and/or charisma. The fourth step toward developing an advocacy strategy is to understand the source and strength of one's persuasion as applicable to specific stakeholders. This is critical to identifying points of leverage within the institution's complex political system.

STEP 5

Aligning Goals Across the Institution

After identifying key stakeholders, it is important to understand what those individuals perceive to be their own strategic goals, opportunities and challenges. Such knowledge will inform how the education abroad administrator presents education abroad as a tool for addressing stakeholders' concerns. For instance, a dean concerned over low retention rates may prove to be a power ally after seeing data confirming that education abroad participation positively correlates with retention and timely graduation. Meanwhile, a vice president wishing to raise the institution's profile as a research powerhouse may be very interested to learn that publications with international coauthors are more likely to appear in top-tier academic journals and have a much higher citation impact than purely domestic collaborations.

Internationalization is the rising tide that lifts all boats and education abroad can prove to be a very versatile wave. Thus, the fifth step toward developing an advocacy strategy is to align education abroad programs, activities and initiatives with the needs and goals of stakeholders. While politics can be a messy game, it is important never to lose sight of the fact that education abroad administrators do not exist to serve themselves, but to serve the students, faculty and staff at their institutions. It is imperative that stakeholders understand this truth in order to realize that advocacy for education abroad is advocacy in their interest.

STEP 6

Storytelling

Finally, it is time to develop a communications plan. This should include how, when and with whom the advocacy message is to be shared. Tactics may range from inviting deans to the education abroad fair to writing monthly press releases about good news stories to inviting influential members of the faculty senate to attend an education abroad conference. Messages should be tailored to specific stakeholders in terms of content, frequency, intensity and terminology.

CONCLUSION

360° Advocacy is a critical skill set for education abroad administrators operating in an environment of limited resources and competing priorities. Along with the right amount of intention and tenacity, the six core principles outlined above will guide education abroad professionals in a path towards 360° advocacy on campus.

Sustaining Education Abroad Values: Ethics and Entrepreneurship in U.S. Higher Education Today

Bill Clabby: University of California, Irvine

Rafael Hoyle, Ph.D.: International Studies Abroad

Laura Thornes: Colorado State University

Relevant to most any discussion of contemporary education abroad is the topic of ethics. Driving discussions in the profession today are issues relating to pressures to continue growing education abroad enrollments while maintaining tuition revenue at home, advancing best practices around health, safety and security, and ensuring educational quality in faculty-directed programming, to name only a few. There are many ethical considerations inherent to these discussions facing the profession that differ from laws, morals, and values.

Values
One's judgment of what is important in life

Morals
One's standards of what is, and is not, acceptable

Ethics
Principles that govern a person's behavior (in a professional setting)

Laws
A system of roles that are created and enforced through social or governmental institutions.

NAFSA's Statement of Ethical Principles[6] and the Forum on Education Abroad's Code of Ethics[7] are relatively new additions to this ongoing dialogue focused on the ethical considerations of our collective work. These documents can be interpreted as aspirational and meant to guide professionals who wish to truly do what is right, well above what is simply required by law. They articulate the goal of doing what is truthful, appropriate, and noble for students, host societies, and institutions through practices that maintain high quality, cultural and legal awareness, transparency, and responsiveness while avoiding conflicts of interest.

As the education abroad profession matures and develops, it is crucial to periodically recognize and interrogate pressing ethical dilemmas. For example, what are the ethical implications involving third-party affiliation agreements and contract negotiations? Do some education abroad marketing, recruitment, and promotional practices raise ethical concerns? Should education abroad offices only partner with for-profit institutions? Are race-blind admissions detrimental to the recruitment of traditionally underrepresented students? Is it ethical for institutions to limit students to a limited number of home institution-approved programs? This article addresses two pressing questions facing the education abroad profession

today, first looking at the ethical aspect of student access and equity before focusing on the long-standing partnership between U.S. colleges and universities and provider organizations.

Can Education Abroad Play a Role in Countering Inequity in Higher Education?

The current national political environment places individuals and communities into adversarial roles with an underlying assumption that if one group gets something, then another group is inherently disadvantaged. Unfortunately, media and political rhetoric accentuates this distorted view by overshadowing data that can inform decision-making in higher education admission policies and strategies that support students and ensure persistence to graduation. One such strategy is providing students with equal access to education abroad opportunities.

Data supports the narrative of inequity in higher education and this inequity extends past the college admissions policies, which are often focused on in U.S. politics. A recent study in Colorado found a large disparity in educational attainment based on race and ethnicity: "Among those who attend a public institution in Colorado, 39% of White students eventually earn a bachelor's degree compared to just 19 percent of Latinos" (Jones, 2018). Colorado State University (CSU) in turn, analyzed the graduation rates of its own student body and found that first-generation college students have lower odds of graduating compared to non-first-generation students (20%, 35%, and 32% lower odds of graduating in 4, 5, or 6 years) and Pell recipients (an indicator of financial-need) also have lower odds (25%,

21%, and 21%) of graduating compared to non-Pell recipients (Colorado State University, 2017).

In response, CSU sought to adjust its support of admitted students and include education abroad as a part of a broader strategy. CSU has since identified effective ways of better supporting students to persist to graduation. For example, cohort programming and living learning communities are beginning to positively impact student retention and persistence to graduation. Other successful co-curricular support structures include key/learning communities, co-curricular programming, parent and family services, as well as education abroad.

Education abroad has qualities of other high impact practices and network building that lead to higher student persistence to graduation. After controlling for similar admission scores and conservatively evaluating only students who persist to the third fall/fifth term, a recent CSU study the data show that education abroad participants graduate at higher rates than students who do not study abroad. In fact, education abroad participants graduate at six percentage points higher than their non-study abroad peers (Colorado State University, 2017). This study suggests that education abroad participation may have an even greater impact on racial/ethnic minorities, first generation students, and Pell recipients, in some cases as much as 11.6%. While a causal relationship is difficult to measure, the study reinforces the idea that the investment of time and resources into high impact practices, like education abroad, has the potential to improve graduation rates for diverse many demographics of students.

Higher education professionals have an ethical responsibility to identify and reduce the barriers that hinder graduation. In much the same way, international educators must address the barriers to an education abroad, which include financial limitations, familial concerns, curricular barriers, and fears of the unknown. It is key to work in partnership with academic departments, student support offices, and international partnerships to create meaningful and accessible programming for all students. Some best practices include:

- developing programming with student support offices that considers the unique needs and interests of traditionally underrepresented students;

- hiring staff and peer mentors who represent the identities of all the students our universities serve;

- working with donors to develop strategic scholarships or funds for passports to first-time passport applicants; and

- thinking about better training for how to educate diverse groups abroad.

If education abroad participation has the potential to positively impact student retention and persistence to graduation, then political rhetoric and a perceived competition for resources should not be a distraction. If so, it would be important to ask:

- How do we partner with campus and community stakeholders to better support all students?

- How do create programming and funding opportunities, which support all of our students and their unique needs?

- Are we aware of our blind spots and implicit biases so that we are ready to hear what support and opportunities diverse individuals need to maximize their potential?

- Are we providing enough staff and faculty training to address concerns related to access, inclusion, and advocacy?

How Can Education Abroad Offices (EAOs) and International Education Organizations (IEOs) Work Together to Ensure Ethical Best Practices?

Education Abroad Offices (EAOs) and International Education Organizations (IEOs) (aka "Providers") play an important role in helping students develop the skills necessary to succeed in an increasingly competitive global society. Both must work hard to thrive and improve operational effectiveness in the face of rising demands and standards. They must demonstrate evidence of learning outcomes, effectively manage health and safety matters, promote expeditious graduation, and ensure that students' experiences abroad are facilitating professional development. Furthermore, many education abroad professionals are often working under tighter time and budgetary constraints, while facing the challenging goal of making education abroad available to a wider, more diverse audience. To achieve successful delivery of education abroad programming,

EAOs and IEOs are becoming more entrepreneurial in their efforts by forging relationships with each other that are not merely transactional, but truly relational. This shift raises some important questions:

- Are there ethical implications of this trend?

- Are these relational partnerships truly helping students?

- Should the collective memory of the New York Attorney General investigation of 2007[8] serve to discourage closer relationships between EAOs and IEOs, many of which are for-profit businesses?

- Is it wise to encourage education abroad professionals to be entrepreneurial?

Current trends may alarm university personnel, particularly those who remain reluctant to incorporate business terminology and practices into higher education. The reasons behind this reluctance are often rooted in the notion that the world of higher education operates under different rules than does the world of business. While this notion is not unfounded, the boundaries between the world of business and that of higher education are becoming less pronounced in an era when universities are operating more and more like businesses, typically under mounting pressure to sustain themselves financially. Education abroad offices are among many campus units that are subject to these pressures. Thus, it is common to see campus-based education abroad professionals, often with humanities backgrounds, looking to adopt "new" management practices and entrepreneurial approaches that, in the world of business, have long been considered commonplace and necessary for survival.

For a number of reasons, it is wise for leaders of EAOs to be cautious when adopting business practices into their operations. EAOs are not businesses, and certainly there are some practices that may be considered acceptable and ethical in the world of business, but not within U.S. higher education. Some businesses may actually have agendas that go against the grain and even undermine the fundamental goals and missions of a university, and there are businesses that place so much emphasis on bottom line that they lose sight of their clients. To be sure, education abroad professionals must remember their universities' missions and avoid business practices that come in conflict with those missions. Nonetheless, they should not shy away from considering new practices that help the institution operate more efficiently, prudently, and strategically towards its goals. A fear of business can put the ability to run sustainable operations and to optimally serve students at risk. The question to ask is not "should EAOs adopt entrepreneurial business practices," but "how can EAOs do so in the most effective and ethical way." One way to achieve this is through transparent and synergistic partnerships between EAOs and IEOs that share similar goals. IEOs have a lot to offer universities. However, the potential cannot be fully realized in the absence of a true partnership (sharing of strategic goals, transparent discussions and arrangements, and identifying and leveraging synergy) between the IEO and the university. It is not uncommon for EAOs and IEOs to enter into transactional relationships that never become relational partnerships (Holloway et al., 2018). This posture limits teamwork and effectiveness. It is understandable that EAOs and IEOs

may want to maintain a distance at the start of a relationship, executing some simple transactions to get acquainted, but not much more. However, the evolution from a transactional relationship into a close partnership can yield far greater benefits to both organizations and, more importantly, to students. The development of a more effective and collaborative relationship takes work and requires, first of all, choosing a good partner, and then a willingness to invest the time to nurture the relationship. Partners must have open and continuous dialogue and build a deep understanding of each other's policies, their people, operational systems, strategic initiatives, financial and legal positions, programming goals, and resources. The ongoing dialogue can reveal opportunities to engage in innovative and mutually beneficial collaboration. Furthermore, it is the bedrock on which a synergistic relationship can be developed.

This type of partnership between an EAO and an IEO emulates the type of business-to-business partnership that successful entrepreneurs seek out to gain efficiencies and synergies. It also implies that the EAO and IEO become equitable partners in the relationship, where they must work together to reach common goals while respecting each other's particular needs and interests. This may all seem quite reasonable. On the other hand, some may take issue with the approach, seeing it as an excessive shift into the "real world" of business, and a weakening of the barriers protecting the seclusion of the ivory tower. The concerns are valid, but we must find a balance between the ideals of the tower and the realities of the real world. This is crucial at a time when universities, like any organization, institution or business, are subject to the requirements of our ultra-competitive global society (Seltzer,

2017). To think universities and EAOs can succeed without leveraging real-world business solutions such as the forging true relationships of partnerships with IEOs is unrealistic. Just as we increasingly encourage students to participate in the "real world" (e.g. internships, community service etc.) without abandoning ivory tower ideals, so too must EAOs pursue connections and relationships with IEOs as equitable partners who are part of the same space and universe.

The myriad benefits of such partnerships between EAOs and IEOs are too lengthy and varied to inventory here but can be found in virtually all aspects of education abroad program management and development. These would include health and safety, student recruitment, enrollment management, scholarship funding, curriculum mapping, outreach to underrepresented students, professional development for staff and faculty, and bilateral exchange support and customized programming. A relationship forged on the principle of a mutual partnership can bring to bear expertise, resources, economies of scale, and innovation, all of which should compel EAOs to take a closer, bolder look at moving beyond traditional partnership models and towards a new chapter of creative and collaborative entrepreneurship. Forging deep collaborative partnerships leads to the identification of synergies, implementation of efficiencies, and exchange of skills and ideas. During these times of unprecedented change, fiscal austerity, and changing budget allocations, Education Abroad professionals must continue to encourage and pursue the forging of deep and open relationships between EAOs and IEOs. By doing so, we can thrive and obtain better results and benefits to all we serve, especially our students.

Conclusion

Universities and colleges are increasingly under pressure to pursue new and entrepreneurial directions to create higher education opportunities. This is especially true at public institutions where there is increasing pressure to find alternative sources of revenue to help close the resources gap resulting from lower state appropriations. This environment has raised a number of challenges higher education administrators face across all higher education sectors and how to pursue entrepreneurial approaches while being ethical and transparent. This article briefly addressed two of these challenges, student access and collaboration. Textbox inserts highlight other pressing ethical questions for further consideration.

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6 NAFSA's Statement of Ethical Principles, https://www.nafsa.org/About_Us/About_NAFSA/Leadership_and_Governance/NAFSA_s_Statement_of_Ethical_Principles/4

7 Forum Code of Ethics for Education Abroad, https://forumea.org/resources/standards-of-good-practice/code-of-ethics/

8 "Study Abroad Is New Focus of Inquiry into Perks" https://www.nytimes.com/2007/08/16/education/16abroad.html

Ethical Questions for Consideration

There are many ethical considerations facing education abroad programming and practice today. These are just some of the key questions currently challenging the profession.

1. The Trump administration recently called for race-blind college admissions, thus rescinding Obama-era guidelines from the Department of Education's Civil Rights Division. As our nation's campuses are becoming increasingly diverse, what are the ethical considerations associated with efforts that fail to appeal to traditionally underrepresented students in education abroad, especially students of color (e.g., diversity scholarships, the development of programming that is of interest to specific groups, etc.)?

2. In 2008, the New York attorney general's office launched an investigation of U.S. education abroad practices, asking specifically about education abroad contract negotiations and affiliation agreements, how each institution

selects the programs it approves, and whether it has received anything of value from an education abroad provider, among other issues. Ultimately, the investigation did not produce significant findings, but the investigation did have ramifications for many institutions. If conducted today, ten years later, what practices might warrant scrutiny?

3. What are the education abroad marketing, recruitment, and promotional practices that raise ethical concerns? Is setting enrollment targets, for example, a practice that deserves professional scrutiny? Some students will inevitably come to education abroad with the desire to travel internationally, which can take precedence over academic and/or career intentions. To what extent is it appropriate to employ marketing techniques designed to 'entice' students with travel-oriented images and messaging?

4. Earlier this year, Purdue University purchased for-profit Kaplan University to produce Purdue Global. The deal was widely watched, criticized, and praised in higher education circles. Is this an innovative or problematic model for education abroad offices wanting to pursue private partnerships to expand access to education abroad programming?

5. Many institutions maintain an approved education abroad portfolio of programs that are vetted in accordance with a set of internal criteria. Students that wish to participate in programs outside of this approved list are often required to take a leave of absence, thus preventing the portability of financial aid and ensuring difficulty with credit transfer. What are the ethical concerns, if any, of maintaining an exclusive education abroad portfolio?

6. Private institutions have long prioritized the "home school tuition" model where education abroad participants pay the standard home school tuition irrespective of the actual cost of the international program. Although this may minimize tuition flight for tuition-dependent institutions, this approach ultimately results in some students paying significantly more than others for the same program. What are the ethical considerations of maintaining the home school tuition model?

7. As universities and education abroad offices increasingly adopt standard business management practices in their day-to-day operations, it is natural that discussions about finances are becoming more routine. Along these lines, there seems to be a greater willingness to talk about revenue generation as they strive to maintain or improve the financial health of their respective organizations. What are some ways to effectively navigate this necessary but delicate area of discussion into their work?

What Would You Do?

Each day, education abroad professionals are confronted with ethical challenges that test the limits of professional boundaries. Consider the following scenarios and answer the question, What would you do?

1. If you knew that your colleague lied to a student to avoid a problem from escalating?

2. If you receive a strong faculty-directed program proposal that will require an inordinate amount of staff time and resources and yet, it will yield very few students?

3. If your office regularly pads education abroad program budgets and rounds amounts up to avoid a potential program deficit?

4. If you generally request two customized provider program proposals for your faculty-directed programs but, for one particular program, you have an ideal partner? Do you request a second protocol of a different partner even though you are sure you will not accept their bid?

5. If a faculty member asks you to add a "slush fund" to his program budget that would be used abroad at his/her discretion to seize impromptu activities for students?

6. If one of your affiliated partner providers is generating increased student enrollments, but mostly among affluent white female students?

7. If you have a service-learning program with a program director that has frequently commented about "helping those poor people abroad?"

8. If you overhear a colleague saying to a student that in order to be successful in today's global interdependent world, he/she must participate in an education abroad program?

9. If a student alleges discrimination from a faculty member at a partner university?

10. If pronouns, gender and names do not "match" for a student in Terra Dotta, Campus Connect and recommendation letters?

11. If a high financial need student feels excluded because "optional" program activity is prohibitively expensive?

Strategic Pathways: An Overview of Operational Funding Models for Education Abroad Offices

Mary Dando: University of Colorado, Boulder

Mark Eckman: University of Wisconsin, Milwaukee

Amanda Maurer: University of South Florida

Miko McFarland: University of Kentucky

Education abroad professionals frequently discuss the topic of program-related financial matters – how to design affordable programming, create sustainable scholarship funding, and maximize the value of education abroad programming. An exploration of how education abroad operations are funded, however, has largely remained on the periphery of professional consideration. Therefore, this article will focus on the funding of operational costs, or those costs that generally include staff salaries and benefits, office space, equipment, marketing costs, staff travel, professional development, and overhead. It must be noted from the outset that there is no single preferred operational financial model and education abroad offices seldom have the luxury of choosing how their operations are funded. Readers new to this topic, or those seeking new ideas in funding education abroad operations, should find this article helpful. It describes the two major education abroad office funding model types (institutional funded vs. self-funded) and variations in between. Finally, institutions just starting an education abroad operation may have no funding model for education abroad at all and are referred to herein as "emerging."

Background

As noted in A History of U.S. Study Abroad: 1965-Present (Hoffa and DePaul, 2007), there is substantial information available about the development of education abroad programs, yet there appears to be far less information available about operational funding models. Depending on an institution's commitment to international education, the operations of some education abroad offices were fully funded by the institution from their outset. Others began with little or no funding and adopted what the authors refer to as the "Cost-plus Model," where an administrative fee is added to the direct cost of an education abroad program to cover the operating budget and overhead.

Beginning in the 1960s and 70s, universities found they could subsidize the expenses of operating an education abroad office by charging overhead costs. Additionally, excess fees that were collected could be used for scholarships, new program development, or planning. Public institutions were more likely than private schools to waive tuition charges, instead charging a program fee to cover direct program costs. Moving into the 1980s and 90s, charging administrative fees became a more prevalent practice across the field.
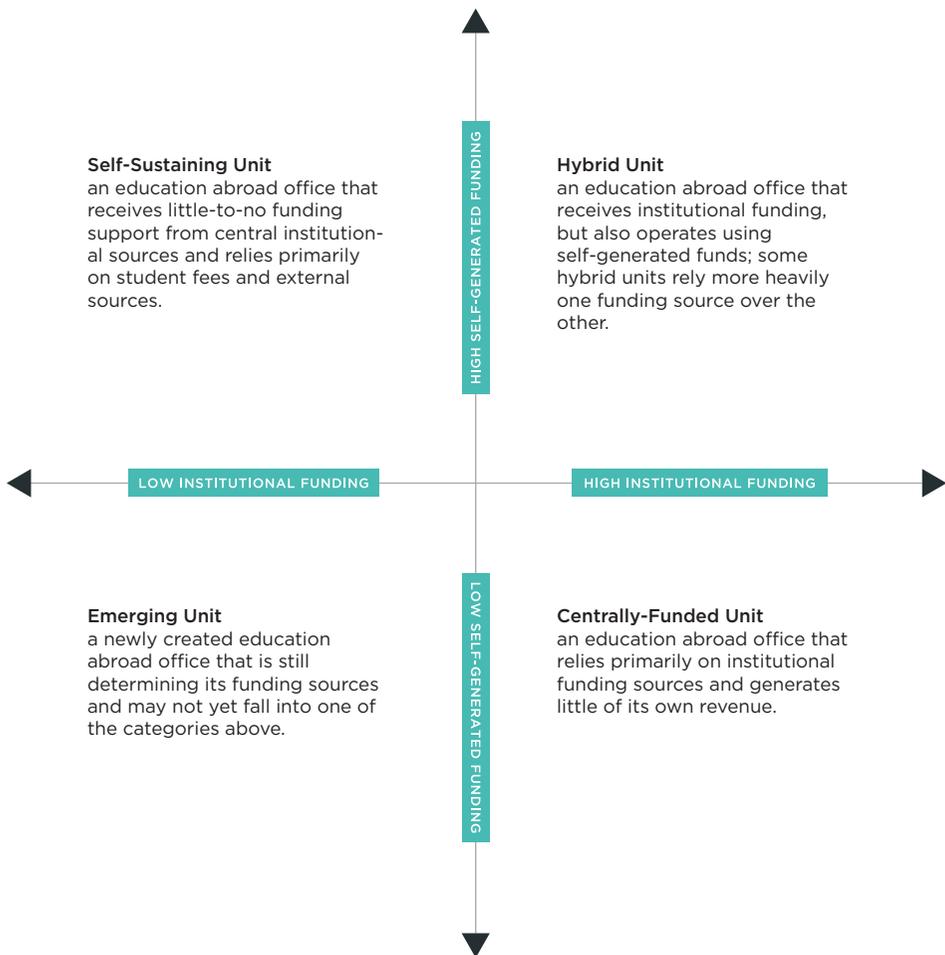
In 2010, as part of the joint NAFSA and APLU project to examine Capacity Building in Study Abroad, two especially pertinent articles emerged to further address the funding models topic. First, in "A Learning Abroad Financial Model that Addresses Multiple Needs," the University of Minnesota Twin Cities explained their self-sustaining (user-funded) model for financing their learning abroad operation (Allen, Johnson, and Peterson, 2010). This model, referred to as Advising, Placement, Academic and Administrative Costs (APAAC) has served Minnesota well for nearly 40 years and contains elements which could be modified for use by other institutions. This paper was soon followed by Heisel and Kissler's white paper, Financial Strategies for Expanding Study Abroad: Models, Mission, Management, and Means for Growth (2010). Section II addressed the categories of financial models, ranging from complete dependence upon central administration for funding to education abroad as an autonomous and self-sustaining unit, with a myriad of hybrids in between. As Heisel and Kissler note, "Study abroad operational models are often highly influenced by legacy and other institution-specific features (p. 7)."

The Forum on Education Abroad now includes data on funding and financial models for education abroad as part of its State of the Field survey. The Forum survey looks broadly at funding sources and operational funding models. According to the 2017 report,

- 82% of respondents indicated they received some institutional funding;

- nearly half (49%) reported that they received funding from student fees paid as part of their education abroad program;

- nearly 60% of institutions identified their offices as being funded by a hybrid of both central funds and self-generated funds; and,

- education abroad administrative fees are more common at public institutions (61%) than at private institutions (40%).

During the past 50-60 years as education abroad operations have developed, a diversity of models and approaches to funding have evolved. Broadly speaking, one can split the source of funding into two categories: institutional or self-generated. Institutional funding sources can be defined as any funds allocated centrally by the institution as part of the institution's annual budgeting processes. Self-generated funding sources can be defined as funds that are generated by the activities of the education abroad offices such as administrative fees assessed by the office, tuition associated with programming, corporate sponsorship or other revenue-generating activities related to education abroad. Figure 1 illustrates a quadrant-style approach by locating operational funding within quadrants of funding sources. These range from low-to-high institutional funding sources and low-to-high self-generated funding sources. The four resulting quadrants give rise to four distinct funding models: Self-Sustaining Unit, Hybrid Unit, Centrally-Funded Unit, and Emerging Unit.

Self-Sustaining Unit
an education abroad office that receives little-to-no funding support from central institutional sources and relies primarily on student fees and external sources.

Hybrid Unit
an education abroad office that receives institutional funding, but also operates using self-generated funds; some hybrid units rely more heavily one funding source over the other.

HIGH SELF-GENERATED FUNDING

LOW INSTITUTIONAL FUNDING

HIGH INSTITUTIONAL FUNDING

LOW SELF-GENERATED FUNDING

Emerging Unit
a newly created education abroad office that is still determining its funding sources and may not yet fall into one of the categories above.

Centrally-Funded Unit
an education abroad office that relies primarily on institutional funding sources and generates little of its own revenue.

Self-Sustaining Unit

The self-sustaining education abroad office is characterized as having little to no financial support from the institution; staff salaries, and most if not all operating expenses (possibly including rent) are covered through revenue generated by the office's activities. In some instances, the office may generate funds for support services in other units.

While there are variations of self-sustaining units, the primary sources of revenue are student fees or administrative charges associated with education abroad enrollment (as opposed to a global fee assessed by the university), and tuition or instructional fees associated with any study abroad or exchange programs managed by the education abroad office (as opposed to central tuition revenue). Generally, self-sustaining offices retain all carry forward balances from one fiscal year to the next. Other activities, such as School of Record relationships, can provide a significant revenue source for a self-sustaining office's operating budget.

One of the clear benefits of a self-sustaining model is that when enrollment

is stable or growing, the office is insulated from budget cuts that impact the broader institution (e.g., reductions in state or endowment funding, reductions in non-resident or international student enrollments, etc.). Thus, while other units within the university might be cut due to a central funding crisis, the education abroad unit can be better positioned to maintain its staff and cover operational costs. There may also be far greater flexibility with regard to the hiring of new staff, which can bring opportunities for greater growth and additional services that support our students and mission. This is particularly true if one can demonstrate a correlation between the addition of staff and the potential for increased enrollment, in turn leading to additional revenue.

While the self-sustaining office has greater security from institutional funding fluctuations, there is a heavier reliance upon the success of education abroad enrollments. Depending upon how narrowly a self-sustaining office covers its operational budget of the unit, enrollments fluctuations can make it easy to slip into the red. If a major international event such as 9/11 or the Great Recession of 2007-2009 were to occur again and drastically reduce enrollments, the self-sustaining office might not be able to meet its financial obligations without proper planning or a financial infusion from the institution. Further, some may argue that a complete absence of central funding for Education Abroad brings into question the institution's commitment to international education.

By necessity, the self-sustaining model is an entrepreneurial approach that in many respects has an education abroad office operating as an enterprise, in addition to also being an academic or student support office. It may foster, by

necessity, greater innovation, flexibility, and efficiencies and may allow for faster growth (although this may not be the case if weighted down by higher charges for students). One risk is that staff time will by necessity need to focus more on programs that enroll large numbers of students. The ability to financially justify having a staff member spend as much time on a program that serves 4-5 students versus spending staff time on a program that serves 40-50 students is an issue in any office, but may be more acute in an office that relies upon enrollment to pay staff salaries.

Centrally-Funded Unit

By definition, the centrally-funded education abroad office receives most, if not all, of its operational budget from the institution. Funding is most often derived from tuition, or perhaps in the case of a public institution from a combination of tuition and state funding. Funds from institutional endowments may be allocated to support study abroad operations.

In the centrally-funded model, the operating budget is determined during the overall institutional budgeting process. Although institutional budgets are generally set on an annual basis, some institutions may have a mechanism to revisit budget allocations on a semi-annual or quarterly basis. Regardless of the timeframe or the budgetary approach used (e.g., static, incremental, zero-base, etc.) what differentiates this model from the self-sustaining model is that an entity external to the education abroad office dictates the funding allocation to education abroad. While input from the education abroad office may help determine appropriate allocations for cost overruns and other contingencies, the budget itself is generally fixed for the

fiscal year. It is important to note that centrally-funded offices may generate revenue through fees and related activity, but in this model, accrued revenue is usually returned to the general fund. In some case, the projected revenue may be a factor in determining the annual budget allocation.

A key advantage to the centrally-funded model is its predictability and reliability that serves has a hedge against dramatic fluctuations in enrollment. There is potentially less external pressure to maintain or increase enrollment from year to year, and less worry about the ability to cover staff salaries in a period of declining enrollment, such as during a recession. Of course, there is always the caveat that a precipitous drop in participant numbers may result in questions and concerns from institutional leadership, potentially resulting in adjustments (e.g., reductions) in subsequent budget allocations.

A related concern with a fixed budget is that it may inhibit the ability of an office to quickly respond to a significant increase in enrollment. Ideally, there is a mechanism for the operating budget of the centrally funded office to see an increase in allocations as enrollment grows. In most cases, however, there are usually few mechanisms in place to make mid-year adjustments to hire more staff, or to invest in new program development. In sum, the office that is totally centrally funded will be insulated from enrollment declines but could face challenges in quickly pursuing opportunities that may yield enrollment increases.

Hybrid Unit

The hybrid unit draws from a combination of both self-sustaining and centrally-funded sources. These units are often positioned to leverage institutional support to generate revenue that can in turn be reinvested into education abroad operations or, in some cases, be utilized to support other institutional initiatives. The two most common sources of funding for hybrid models are funds earmarked by the institution and revenue generated from student fees, grants, campus-wide student fees, and corporate sponsorships, to name only a few sources. Depending on the ratio institutional funding support to self-generated funding, a hybrid budget can operate much like one of the aforementioned models, or function like both simultaneously. Within this model, the utilization of institutional funds vs. self-generated funds is often governed by some internal protocols. For example, institutional funding may be used to cover staff salaries and benefits and self-generated revenue is needed to cover operational expenses, such as professional development, marketing, software, travel, etc.

Emerging Unit

Although there are more than 3,500 higher education institutions nationwide, only about 1,000 report education abroad enrollments to Open Doors each year. As such, it is quite likely that there are numerous institutions with small or emerging education abroad operations where both central and self-generated funding sources are limited. Such institutions may have limited education abroad operations, where funding in support of education abroad may be

limited to salaries or as course-load reductions for faculty members. These institutions generally do not have systems or structures in place that generate revenue or allow external capacity development.

Without the legacy of an operational funding model, emerging offices may be in a position to determine which funding model best aligns with their goals and available resources. In designing a funding model, the primary consideration would be the level of financial commitment from the institution. If there is a strong institutional will to build an education abroad office, the centrally-funded model may be an ideal choice. Alternatively, a hybrid model could make the supplemental funding necessary to get a completely new program up and running. A fully self-sustaining model may be out of reach lest the institution commit some early funding to develop and implement a strategy to increase the education abroad enrollments that are needed to generate adequate financial resources to support a self-sustaining office, even as a one-time contribution to ensure a smooth launch of operations.

Discussion

It is important to consider the various operational funding types so as to understand strengths and challenges associated with each. There are a variety of factors that may limit the choices an education abroad unit has with regard to establishing its own financial model. For example, education abroad offices in decentralized institutional contexts (e.g., separate education abroad offices within a variety of different schools or colleges) may make it very difficult to move from a centrally-funded office into a hybrid or self-sustaining unit, particularly if it is based on the assessment of high

administrative fees. Similarly, private institutions are more likely to be centrally-funded and may have a difficult time assessing additional fees on top of their tuition. If an institution has a large percentage of Pell-eligible students, the pressure to keep costs down may steer an institution away from assessing any level of administrative fees that could support a position. Apart from the considerations which led to the adoption of a specific model, each education abroad office must navigate within the home institution context. Each model can present both unique opportunities and unavoidable risks.

A completely self-sustaining operational model suggests that it has both weaknesses and strengths. There are a number of inherent risks to this approach. First, a sustained downturn in enrollment, while rare, could result in a significant loss in revenue. If large enough, such a loss could result in staff cuts. Second, this model demands prudent financial practices, including the establishment of an approved financial reserve to cover emergencies and unexpected expenses. Finally, if surplus revenues are not properly spent down or invested, there is the risk that the institution will absorb the surplus funds.

The strengths of this self-sustaining model are that it provides the education abroad office with greater autonomy. The ability to choose where to concentrate efforts, to hire staff as needed, and to develop new programs come hand-in-hand with the financial freedom of this model. Additionally, there are more opportunities to be enterprising and nimble when developing new programs and efficiencies. Investments of capital funds, budget requisitions, and cumbersome Request for Proposal processes can be limiting when opportunities for growth

are fleeting. Further, the ability to quickly adapt to enrollment trends ensures less uncertainty about the annual operating budget. Finally, when surplus revenue is collected (probably due to increased enrollment), funds can be returned to students through scholarships or used to invest in additional staff or student programming.

A concern for many of the hybrid and self-sustaining offices is the cost that is passed on to students who are studying abroad. When considering the opportunity costs of the self-sustaining model, consider the following questions:

• What is the appropriate administrative fee that needs to be charged to students that will cover operating expenses without generating a runaway surplus?

• What is the appropriate administrative fee to charge without causing the programs to be unduly expensive?

• Should there be a differential fee for summer, semester, and academic year programs? (This is a common practice, but it should be noted that the amount of work to support a student may be the same for a short-term program as compared to a longer term abroad.)

• What steps can be taken to balance the need to cover the bottom line with issues relating to access and diversity?

• How should the education abroad office plan for continued operation during enrollment decline?

On the other hand, the self-sustaining model could offer the opportunity to create additional scholarships from surplus funds left after all operational costs are covered. When this occurs, the self-sustaining office has an even greater incentive to increase enrollment, and this is almost always a win/win situation for the education abroad office, for students, and for the institution.

An education abroad office using the hybrid model may be able to address this challenge in the same way, but it will do well to consider two important factors. First, when centrally-provided funds form the majority of the operating budget, the office will need to be cautious about doling out surplus funds to students. Similarly, when institutional aid is portable, there may also be an expectation that surplus funds are returned to the institution as a cost-recovery method. Well established and transparent revenue-sharing models will help in clarifying these expectations and provide guidance on how to allocate surplus funds.

The hybrid model could be considered an acknowledgement of this unique cost sharing or cost recovery mechanism to expand the value of each contributing funding source. This arrangement can benefit both the institution and the education abroad office by maximizing the contributions from each. When enrollment grows, additional revenue can be utilized to support more entrepreneurial and innovative initiatives such as faculty engagement, campus programming and outreach, more technology, or even more personnel. There is a widely held perception that, of the different funding models, the centrally-funded approach provides the most security and stability. To a very real extent this is true; during times of study

abroad enrollment decline, central funding sources allow the office to maintain some core functions and/or staffing while making necessary budgetary and operational adjustments. However, the viability of a centrally-funded office is never more secure than the stability of the institution. Changes in university leadership and the relative importance of education abroad in their agenda can also dramatically affect funding allocations, this is especially true in the centrally-funded model.

Because the exclusive source of operational funds is the institution, declines in enrollment and budget cuts at the institutional level will, by necessity, have an impact on the education abroad office. It is true that in some cases a centrally-funded office will charge student fees that are often returned to the central funding pool. These fees can be used to help defray the operational costs of the institution or even to help ensure a more robust home-tuition model.

Those education abroad office that have made the linkage between the success of the institution and participation in international education may find that the centrally-funded model works particularly well. If the institutional leadership sees a strong return on investment, the office budget will increase as a reflection of the positive feedback loop created by a robust international education program. However, in the absence of a thorough understanding of the interplay between the institutional funding and the return on the investment, there is no guarantee that a centrally-funded office benefits from the valuable role that education abroad programs provide within higher education.

Does the centrally-funded model suggest that it is the most sustainable for education abroad offices? Education

abroad offices need to remain flexible in order to navigate the ever-changing landscape of our quickly evolving field. A self-sustaining, or largely self-sustaining, office with positive enrollment growth provides the greatest flexibility to weather even the most difficult of campus financial climates. However, high program fees can call into question the program's accessibility for students with financial need. Thus, budget models largely dependent on student fees must address this barrier by integrating accessibility measures directly into the budget itself. For hybrid models, the largest expenditures, such as staffing, can be offset by central funding contributions, keeping student fees lower and allowing the institution to supplement central contributions with additional revenue sources. Thus, diversification of the office's operational budget can lessen the impact of enrollment fluctuations but also provide entrepreneurial investment opportunities to ensure long-term enrollment growth.

Independent of which model the office adopts, it is important to understand the education abroad growth plan, so that efforts can be taken to align the funding model with the institutional strategy. Does the institution expect the office to maintain an ambitious enrollment trajectory? Perhaps the status quo or slower growth best complements the institution's strategic plan. Ideally, the operational funding model remains flexible and adaptable as student demographic and opportunities change.

Knowing how each of these operational models intersects will allow education abroad offices to advocate for change and/or reposition themselves. While it's not possible for an entirely centrally-funded office to become an entirely self-sustaining office overnight, the

models introduced in this publication will hopefully help offices that are considering a transition to achieve their goals and navigate pitfalls. The following questions are offered for further reflection and discussion.

- As state funding of higher education is reduced, will other student-focused units be forced to consider a more self-sustaining approach? Are education abroad offices on the vanguard of a campus-wide trend?

- Is the self-sustaining office in a better position to hire more staff and create more affordable programming that allows a wide spectrum of students to participate?

- How can education abroad offices diversify revenue sources to provide more stability and durability across all of the financial models? Are there some common strategies that would succeed across the board?

- Are there any correlations between an institution's type or size and the way the education abroad office is funded? Is there a correlation between growth in education abroad enrollment and funding models?

Five Tips for Maximizing Your Education Abroad Budget[9]

Anthony C. Ogden, Ph.D.: University of Wyoming

Take out a bunch of coins and put them flat on your desk. Push them together so that they are touching but not overlapping. What do you see?

Those coins nicely grouped together on your desktop, in all their different values, sizes, and colors provide an apt analogy with which to consider the varying systems and structures at your home institution. Some coins are larger and more imposing, but size alone doesn't dictate value or worth. Although the colors may vary and there may be multiple coins of the same denomination, assuredly some appear newer and shinier while others may be older and well-worn. Some are heads-up while others are heads-down. In much the same way, institutional systems and structures vary by prominence, redundancy, and relevance. And just as some of the coins are touching, some systems and structures at your institution may appear to be strategically aligned while others are seemingly random or without purpose.

It is critically important for higher education administrators to understand the intricate nuances of the systems and structures at their home institutions and to maneuver accordingly to ensure compliance, transparency, and efficiency. What is perhaps even more important, however, is to acknowledge the gaps in the spaces between the coins, for it is precisely in these gaps where one can navigate between existing systems and structures. It is the ability to expertly navigate these spaces that enables one to thrive within institutional bureaucracies.

What follows are five tips for education abroad professionals that encourage looking beyond day-to-day practices and protocols, or the standard refrain "we've always done it this way," to considering new or alternative ways to maximize education abroad operational budgets, thereby enhancing overall operations.

1. **Align International Rationale, Strategy, and Resources**

   Education abroad office funding models vary by institution, ranging from primarily self-sustaining offices that are funded through tuition, fees, and external revenue to primarily centrally funded offices that receive an annual allocation provided by the institution. What is consistent across institutions, however, is that all education abroad offices should have an operating budget that is easily accessible and used as a road map for how the office sets its priorities for the year. The budget is to be used as a tool for decision making and as a means by which to monitor financial performance.

   Maximizing the budget requires tightly aligning rationale, strategy, and resources. In other words, the budget should ideally emerge from a strategic plan, which articulates the outputs and outcomes of internationalization efforts. As such, the budget indicates an agreement on what activities or initiatives will be prioritized for the year and how resources will be utilized. It also allows the office to discontinue those traditional functions or initiatives that no longer align with the goals and direction of the institution.

   The office funding model will dictate how the budget is to be constructed and what revenue and expenses should be tracked. When creating the budget, it is important to determine the extent to which fund balances, if any, can be carried forward across fiscal years and what restrictions are in place for using these funds. It is similarly important to determine if the office is required to develop and maintain a contingency fund account for international emergencies and, if so, how and at what desired amount. Especially for self-sustaining offices, it is important to investigate the extent to which reserve accounts can be created to maintain operations in the event that unexpected enrollment shifts lead to decreased revenue. Finally, it is important to determine how to handle financial losses and gains on program-specific budgets.

2. **Plan Well and Promote Transparency, Engagement, and Flexibility**

   Why all the secrecy around office budgets? There is seldom any need to keep an office budget secret; rather, there is much to be gained by engaging the team and key stakeholders in monitoring financial decisions and the smooth operation of the office. The extent and ease with which others can access the operational budget is a prerequisite for participation and accountability. Budget transparency allows others to understand the office's priorities and can potentially remove speculation and doubt.

When determining an annual budget, do so in partnership with key members of the team, especially those that are to be assigned the responsibility and authority for implementing essential sections of the budget. Ensure that the budget is updated continuously so that all can monitor current revenue flows to expenses. If possible, add year-on-year comparisons to gauge the level of activity relative to previous years. Don't hesitate to make mid-year adjustments, if necessary, to pursue unplanned opportunities. And remember that it is in one's best interest to plan and budget as precisely as possible. Whereas one might naturally feel pleased with being underbudget, note that any underutilized money could have been allocated elsewhere in the budget to advance other priorities.

3. Look Beyond the Funding Model

According to the 2017 State of the Field survey conducted by the Forum on Education Abroad, of the 259 institutions and organizations that responded, 35% of U.S. private institutions and 47% of public institutions indicated that rising costs and/or declining resources have led their institutions to change their education abroad operations for the coming academic year. In addition to cutting expenses and increasing internal advocacy efforts, education abroad professionals are readily looking to external sources of funding and support. Many are actively engaging in alumni and donor stewardship, corporate and community outreach, organizing fundraising events, writing grant proposals, advocating at state and federal levels, and so on.

A less common, but seemingly effective approach involves leveraging new partnerships or collaborations that can potentially extend capacity and ease staff workloads. For example, some offices have partnered with travel agencies for assistance with supporting student travel or have called upon insurance providers to help defray costs associated with producing health and safety materials. Similarly, many offices have started to turn to affiliated provider organizations for assistance with student advising, portfolio management, faculty-directed programming, campus promotion and outreach, evaluation and assessment research, and increasing student scholarship support. Still, others are exploring revenue-generating activities, such as event and materials sponsorship, becoming a School of Record, and becoming a designated campus passport office.

4. **Couple the Professional Development Budget with Annual Performance Planning**

Irrespective of the total operational budget, it is important to have a clear and transparent strategy for the professional development of the team. It is rather common for education abroad offices to prioritize funding for international site visits, conferences, and professional memberships. It is less common, however, for such offices to proactively align annual performance goals and expectations with professional development funding. Consider having each member of the team develop a professional development plan that aligns with his/her respective annual performance evaluation and job description. Individual plans should be developed in recognition of the essential knowledge and skills that are needed for further success. Allocate the professional development funds accordingly. Better still might be to develop a system in which an annual pre-determined amount is allocated to each individual and, if possible, allow the total amount to accrue across fiscal years up to a maximum limit. This approach empowers team members to take further ownership of their own professional development and encourages intentional long-term planning and saving for more expensive professional development opportunities. If possible, be sure to set aside an amount to further incentivize team members to pursue professional development initiatives that align with the priorities of the office. For example, if it is a priority of the office that team members show progress in their development as international educators, incentivize conference presentations, research and scholarship, engaging in professional associations, etc. In time, this approach may save money, boost overall staff performance and morale, and increase employee retention rates.

5. **Invest in Your Faculty**

The Golden Rule is very simple and goes something like this: "Do unto others as you would have them do unto you." In the education abroad profession, however, it is essential to adopt the Platinum Rule: "Do unto the faculty as they would want done unto them." For years, education abroad professionals have struggled with how to engage the faculty in education abroad programming rather than more appropriately focusing on understanding the motivations of the faculty and how to leverage international education as a means to support the realization of their goals. At any institution, the faculty own and control the curriculum and any real success in advancing education abroad is found by working with, and through, the faculty. So, focus on what the faculty want and assure a better outcome.

Rather than invest so heavily in direct student marketing and promotional activities, consider re-aligning the annual budget with the goals and strategies of the institutional academic units. Know what is being prioritized, what metrics have been determined, what is being assessed, and what new initiatives are being launched. Collaborate as a supportive partner and seek opportunities for joint programming, cost-sharing, and revenue generation. Pursue opportunities that support the international engagement of your faculty by investing in international faculty development seminars, international research collaborations, visiting faculty appointments, and so on. Keep in mind, students generally stay for four years, but faculty can stay on for decades. Investing in faculty gradually lessens the financial burden of student marketing and promotion and stimulates curriculum integration.

9 Originally published, May 23, 2018, https://isatoday.wordpress.com/2018/05/23/5-tips-for-maximizing-your-education-abroad-budget/

Tips for Effective Operational Budgeting and Planning

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Education abroad professionals typically are not business nor accounting professionals. But increasingly they are asked to function in these roles as the financial pressures of their offices grow. Moreover, for those managing organizations with limited staff, there might not be access to a proper financial manager or accountant to provide support. What are they to do? Complicating the challenge is the reluctance in the field to publicly acknowledge this reality. How many sessions at any of the major conferences were meaningful short- and long-term financial strategies discussed? The business of education abroad is the elephant in the room that no one talks about.

Unfortunately, there are few resources available in the field to assist and train education abroad professionals on the fiscal and budgetary side of the profession. In fact, the standards available in the field to consider and work into practice provide very limited guidance on budgeting and fiscal management. These standards are the Forum on Education Abroad's Standards of Good Practice for Education Abroad and the Council on Advanced Standards – Standards and Guidelines for Education Abroad Programs and Service. (Forum on Education Abroad, 2015; Council on Advanced Standards, 2014)

These standards do not provide the type of practical guidance needed for education abroad professionals to succeed. How does one go about constructing an annual budget? What should they look like? How complex should they be? Recognizing that every institution will have unique characteristics, below are compiled some practical considerations education abroad professionals should take when constructing their annual budgets.

1. **Consider your stakeholders**

   Education abroad offices have multiple stakeholders across campus, and our budgets should address each of these populations. Your staff is foremost among them. Make sure you allot funds in your annual budget to address their professional development. What are the needs of your staff to attend conferences, workshops, webinar site visits? How are you making decisions about which opportunities to fund? Are the professional development opportunities tied to the short, medium and long-term professional development goals of each staff member?

   Faculty engagement is key to increasing your capacity. So how is your budget addressing this? Are you putting in expenditures for faculty to participate on exploratory site visits for new or existing programs? Are you providing funds for them to participate in intercultural learning

seminars? Are your incentivizing them to include undergraduates in their international research projects?

What about your campus partners? It takes a village to grow student mobility, and no education abroad office no matter how well staffed can do it alone. How is your budget engaging these key partners? Do you allocate funds to support joint projects that can advance shared goals? Career services, diversity offices, undergraduate research...these are all important partners for most education abroad offices, and you should think strategically about how your budget allows your office to build and strengthen those relationships.

And finally, the students. You can certainly make the case that ultimately every aspect of our budget serves our student either directly or indirectly. But what more might we do? Are you funding student scholarships from your annual budget? Do you have a paid student worker program on campus? Are you allowing for returned student to stay engaged by funding their participation in returned student events and conferences?

2. Consider your goals

Your budget should impact the short, medium and long-term goals of the education abroad office. The short-term goals are always the most immediate and obvious. We need to keep the lights on and our computer systems running! But what about short-term goals as they relate to programming? With the growth in faculty directed programming, you should consider allocation funds in your annual budget to subsidize new program of this type. As we

all know, there is a plenty of heavy lifting that goes into the design and administration of these programs, and frequently they need some additional support the first year. Why not build a fund in your budget that provides discretionary funds for you to subsidize these programs on the front end instead of trying to rob Peter to pay Paul in the eleventh hour?

Medium- and long-term goals are more challenging to think about through the lens of your budget. But we should all be doing this. Are there academic departments that are under performing in terms of student mobility? Do you have new leadership in place in key areas that impact education abroad? If you answered yes to either of these, then how is your budget addressing these challenges? Are you building trust and strategic alliances by providing funding to send key faculty and department heads on international site visits? Are you partnering with underperforming academic departments on scholarships to increase student mobility? None of these investments will necessarily move the needle in a positive direction in a single year, but if you consider the 3-5-year window, then these strategic budgetary inclusions can certainly pay dividends.

3. Consider how to handle overages and budget deficits

A common challenge faced by many education abroad offices is how to plan for spending when the majority of your revenue might come from summer enrollments which are usually not finalized until the 4th quarter. How do you plan for this? Consider creating a spending plan that includes expenditures based on low, medium

and high revenue projections. This will allow you to execute purchases and investments with a short time frame should your summer revenue be higher than anticipated.

But what if you have funds remaining at the end of the fiscal year? Can you roll these funds into the next year? If not, do you lose the money to the institutional black hole? What other possibilities are there? Could you pre-populate scholarship accounts with these funds? Or perhaps invest in new faculty directed programming?

If your funds do roll into the next fiscal year, how much can be used on operational expenses and how much can you put into your reserves? Speaking of reserves, do you have any? If so, how much? Have you benchmarked your reserves against other education abroad offices with a similar financial structure and size? Have you discussed the expectations of your reserve with the financial leadership team at your institution?

4. Consider your budget a living document

After spending so much time and mental energy crafting an annual budget, it is tempting to consider it a flawed masterpiece, put some nice matting around it, a frame and hang it on the wall for all to see. Resist the temptation! Don't fall in love with your budget! Budgets are living documents. They can and should change to address shifts in spending priorities.

What you should do is meticulously track your monthly spending for each line itemed section of your budget and have more extensive quarterly budget meetings where your financial team (even if that's just you and our best friend excel) can consider more substantive changes.

Tips for Reinvestment of Fund Balance Returns[10]

Anthony C. Ogden, Ph.D.: University of Wyoming

Much earlier in my career, I had the opportunity to manage my first education abroad office budget. I had taken budget management courses in graduate school and felt confident in my ability to monitor revenue flows and track monthly expenses. My team and I spent a long time developing our operational budget and I worked hard to ensure we stayed on course. We saved where we could and invested smartly in new opportunities. At the end of the year, I was pleased to report that we were under-budget and had saved the organization considerably. Much to my surprise, my boss was disappointed. What could I have done wrong?!

What I've learned over the years since is that one should budget and plan as accurately as possible, while retaining some degree of flexibility to react to changes and manage the unexpected. Although saving money is not bad, I quickly recognized that underutilized money could have been allocated elsewhere in the budget to advance other priorities. Over-budgeting suggests poor planning - encouraging supervisors to question why the resources were ever needed and, understandably, to become skeptical of future budget requests.

In spite of our best efforts with planning and management, some education abroad budgets will invariably fall over or under our best estimations. Even the most resilient education abroad budget is subject to the vagaries of international programming. Currency fluctuations, enrollment shifts, changes in institutional policies, staff turnover, international emergencies, and much more can quickly throw even the most meticulous education abroad office budget into disarray. Thus, it is important to carefully track revenue and expenses monthly and make proactive corrections throughout the fiscal year.

Most institutions generally have well-articulated financial policies and protocols in place for responding to fiscal year budget losses and returns. In the case of fund balance returns, some institutions may simply allocate any underutilized money back to its central coffers, while other institutions may allow fund balances, either in part or whole, to roll over within the unit across fiscal years, especially because education abroad operations rarely align with fiscal year calendars. What follows are ways some institutions utilize fund balance returns that are allowed to carry forward across fiscal years.

1. **Maintain Office Reserves**

   For those primarily self-sustaining offices that are funded through tuition, fees, and external revenue, it is important to maintain financial reserves that allow the office to respond to abrupt shifts in revenue. Even a modest downward enrollment shift, for example, can result in budget shortfalls, which can impact planning, staffing, and momentum. Having a secure financial foundation can prevent potential downward spirals. Centrally funded offices that receive an annual allocation may consider using fund balance returns as a reserve for long-term, strategic planning, and related initiatives.

2. **Bolster Contingency Funds**

   Many education abroad offices maintain a contingency fund account intended for health, safety and security crises. In alignment with peer institutional benchmarks, most institutions will have a targeted contingency fund amount that is maintained over time. Accordingly, a variable contingency fee may be added to student program fees to generate the targeted contingency fund amount. Alternatively, fund balance returns can be allocated to contingency funding, thus minimizing student fees and further abating institutional risk.

3. **Invest in Staff Professional Development**

   While managing the operational budget is an important role for any education abroad director, it is similarly important to never lose sight of one's most important assets: the education abroad team! Just as it is important to budget for professional development in any given year (Henke, 2014), fund balance returns can be used strategically to support long-term staff development initiatives across fiscal years.

4. **Create Targeted Education Abroad Scholarships**

   It is essential to periodically review existing scholarship protocols to ensure that recurring funds are being leveraged effectively to enable students that might otherwise self-select out of education abroad, to be able to participate. Fund balance returns can be used effectively to create scholarship opportunities that target specific student populations, particularly those who are traditionally underrepresented in education abroad programming. It may be possible to even position these funds to generate matching scholarships with other academic units on campus or even with affiliated provider organizations.

Many institutions today are offering a growing number faculty-directed programs, which, unless customized through affiliated program providers, generally involve developing, managing, and reconciling complex program budgets. Not surprisingly, many institutions are also quickly developing budgeting protocols for such programming. As with any other budgets, these programs can also generate fund balances. Indeed, some programs experience financial loss, which can result from poor budgeting, currency fluctuations, unplanned and un-budgeted activities, etc. Other programs are reconciled with positive balances, which often result from unexpectedly high enrollment, padded budgets, and favorable rounding estimations at the time of budgeting. Although most education abroad offices have become increasingly savvy with ensuring, to the extent possible, that faculty-directed programs maintain zero-balanced budgets, some offices still see positive fund balances, even after offsetting budget losses across their broader program portfolio. What follows are some common practices for utilizing fund balance returns from faculty-directed programming.

1. **Make Refunds to Student Participants**

    If, during the course of a faculty-directed program, unplanned savings significantly reduce actual costs, it may be desirable, if not always feasible, to actually refund each participant in equal measure. However, refunds should be issued only after all program costs are reconciled via appropriate institutional financial processes. It may be necessary to determine a minimum threshold that would warrant such refunds as doing so may be overly burdensome, complicated, and costly.

2. **Share Fund Balances (and Losses) with Sponsoring Academic Units**

    In cases where sponsoring academic units must provide financial backing, it may make sense that these same academic units are allocated, in part or whole, any fund balance returns, provided that all institutional oversight protocols for budgeting and planning were met. If such distributions are to be made, it may be necessary to develop clear and transparent protocols or an institution-wide framework for the use of such funds. Common approaches include: a) creating discipline-specific scholarships in support of education abroad participation, b) offering program subsidies to lower overall student costs on future programs, c) providing funding for education abroad site visits and program evaluations, d) incentivizing the development of new education abroad programs and/or the enhancement of existing programming, and e) covering personnel expenses or other administrative expenses directly in support of education abroad programming.

3. **Reinvest in Faculty-Directed Programming**

It is important to remember that the use of fund balances should be primarily in support of the purpose in which the funds were originally gathered and not re-allocated to support operational costs. In addition to creating institution-wide scholarships in support of faculty-directed education abroad programing, common approaches to using these funds include a) encouraging new programming via program development grants that align with the institution's overarching goals for education abroad, b) conducting thematic faculty-development seminars, site visits, and/or program evaluations, c) offering booster grants for programs that require a financial subsidy to ensure viability, such as pilot programming with controlled enrollments or experiential programs with pedagogical reasons to lower student to faculty ratios, and d) promoting broader program enhancements that target a particular purpose allocating money to create an environmental sustainability grant fund. Program directors can apply for mini-grants, for instance, to offset the cost of an event or activity that supports learning and/or recognition of environmental sustainability. The focus area can even vary from year to year.

It should go without saying that when it comes to handling fund balances, education abroad offices should proceed with caution. It helps to remember that these funds have come from student sources and it is our responsibility as stewards of their investment to budget and plan with the utmost care and attention. When there are fund balances, it is critical that the protocols for reinvestment are clear, transparent, and reviewed on a systematic basis for maximum efficacy and impact. It is critical that to seek broad input, especially from faculty and administrators, when determining institutional protocols for fund balance management and ensuring approval at the highest levels. After reinvestment occurs, it is equally crucial to develop efficient and consistent accounting records and reporting mechanisms. When reinvesting with clear purpose, strategy, and transparency, fund balances can work to enhance education abroad programming for all.

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10 Originally published June 20, 2018, https://isatoday.wordpress.com/2018/06/20/tips-for-reinvestment-of-fund-balance-returns/

Tips for Effective Financial Management of Faculty-Directed Programs

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Among all U.S. students that earn credit studying abroad, over 60% choose short-term programs (Institute of International Education, 2017), of which faculty-directed programming appears to be the fastest-growing segment. As this program type is increasingly dominating education abroad enrollments, opportunities exist for further discussion and examination. At ISA ThinkDen 2018, a breakout discussion was convened to explore innovative strategies for enhancing the financial management of faculty-directed programs, identify common missteps or obstacles in managing program budgets, and how to work more effectively with faculty and key campus stakeholders. The discussion was structured along four primary areas of consideration:

- Program budgeting, defined as a tool for decision-making and a means to monitor financial performance.

- Reconciliation, defined as an auditing procedure to compare balances of transactions (program expenses) to the budget allocations and review of alignment with institutional fiscal policies.

- College/departmental distributions, defined as a portion of the budget allocated to sharing revenue between the education abroad office and institutional units.

- Protocol for fund balance returns, defined as a determination to decide how any budget surplus should be carried forward across fiscal years and restrictions for utilizing these funds.

These four areas of financial management were considered over the life cycle stages of a short-term faculty-directed program: Pre-program Planning, On-site Budget Management, and Post-program Financial Processing.

Pre-Program Planning

Effective communication and training with program directors prior to the start of each program is imperative to ensure adherence to institutional priorities and policies. Clear assessments of expectations during the planning stage will set the stage for a positive and financially sound faculty-directed program.

- It is essential to work closely with key stakeholders that oversee, assist, or manage institutional financial processes to develop a static budget template that considers and/or reflects allocations for faculty salaries, college/departmental distributions, and/or fund balance returns. Transparent and well-communicated protocols should be established so that there are few questions about budget allocations during the pre-program planning phase.

- The budget template should be shared in advance with program directors, and all directors should be required to have a one-on-one meeting with the education abroad office to review and develop the final program budget. Developing the budget in tandem with a member of the education abroad office helps to ensure budget accuracy, ascertain all program elements are accounted for, and discuss variations in foreign exchange rates. These meetings provide a great opportunity to clarify any questions regarding institutional policies with the program directors and ensure program budgets are accurately developed and understood.

Education abroad staff should follow current international events, political developments, and currency market fluctuations so they are aware of and can account for potential changes that can adversely impact program budgets.

- For customized programming, it is essential to develop a well-understood protocol to consistently assess program proposals. Developing a rubric or protocol in advance allows the education abroad office and program director to remain objective in vetting provider bids for customized programs. It is similarly best practice to obtain multiple bids. Utilize the rubric together with program directors.

- The budget should include only actual on-site expenses and not be based on overestimation to allow for superfluous spending. Faculty should be instructed to allocate any potential surplus funding towards student expenses in lieu of increasing discretionary or increased spending for faculty expenses. A detailed financial tracking and reconciliation spreadsheet should be developed to allow program directors to enter expenses early on to monitor their spending, so they can ensure they are operating within the established program budget. If possible, include a mechanism for populating (live) currency conversions into the spreadsheet to reduce the time faculty will spend on identifying the daily exchange rates. The program director should be included as a partner in the future reconciliation process by offering periodic financial training workshops to review processes, share best practices, and address concerns.

On-Site Budget Management

Ongoing budgetary support is a necessary component to ensure each program director facilitates the education abroad program in a manner consistent with prescribed institutional financial management policies.

- Discuss the level of flexibility the home institution allows for spending earmarked money on site. What are the institutions policies related to fungibility? Can the faculty member reallocate savings in one budget line item for a different type of expense? It is important that the education abroad office maintain an open communication channel to discuss questions as they arise to minimize reporting errors. Advise faculty to watch for hidden expenses (e.g., foreign transaction fees or unexpected costs).

- Utilize new technology to monitor and track expenses. There are several smartphone apps that can be employed to assist faculty in organizing and tracking expenses/receipts (e.g., Biz/Expense, Jotnot, Scan Genius, Concur, etc.). Consider embedding a detailed financial tracking and reconciliation spreadsheet into a cloud-based online drive or system for faculty to enter and submit their expense documentation, thereby creating real-time expense tracking.

- Provide a reference guide detailing approved and prohibited expenses on programs. If program directors use a corporate credit card, create a card sleeve with tips on "do's and don'ts." Suggest ways to keep receipts organized (e.g., a small accordion file, envelope, or file) or establish a preferred and accepted method of providing electronic receipt copies. If the program director uses personal cash or credit cards for program expenses, outline clear reimbursement policies regarding exchange rates (based on a specific web site or app) and transaction fees.

- Eliminate any conflicts of interests where the faculty member, department, or college could disproportionately benefit from a program returning with surplus funding. It is important to be transparent by creating a straightforward and readily available refund policy for programs that return with a surplus balance. Transparency will reduce the potential for student complaints about being overcharged.

Post-Program Financial Processing

As with the pre-program planning stage, program directors need clear instructions to reconcile program expenses in alignment with institutional expectations and policies.

- Set clear expectations with program directors regarding the timeline for submitting receipts, typically within a set date of program completion. Designate an employee (or employees) to be responsible for program reconciliation and encourage them to meet one-on-one with faculty members who are having difficulties navigating the process. This can expedite closing out program accounts in a timely fashion. Transparency is key. Provide a clear audit trail to justify the rationale and process for reconciling program budgets and distribution of fund balance returns.

- Debrief with program directors, not only about program activities and logistics, but also the financial successes and challenges of the program. Adding a financial lens to the debriefing meetings can identify areas for improvement for future iterations of the program.

- Provide professional support to education abroad program staff who are responsible for the reconciliation process, such as membership to the Higher Education International Business Officers (HEIBO) or the National Association of College and University Business Officers (NACUBO).

- Be mindful of the college or department when creating policies about budget surpluses. Consider allocating some of the surplus toward offsetting cost for future college or department programming or designating it for scholarships or future program development expenses. Clearly identify the different types of funds in question. Does the fund balance have a specific intent, or must surplus revenue be distributed to the general fund?

Effective financial management of faculty-directed programs is a substantial topic in overall scope. Questions for further consideration include: How do the strategies here relate to the broader topic of leveraging faculty-directed programs to maximize overall operations? What are additional strategies worth? What role does scholarship funding (using funds or generating funds) play in effective financal management of faculty-directed programming?

Expanding Education Abroad Through Faculty Engagement[11]

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Among students, faculty and the administration, where do we focus most of our attention? We often feel the restraints of the administrative straightjacket or allow ourselves to get swept up by the demands of just a few faculty members. For most education abroad professionals though, we are primarily concerned with our students. After all, student learning and development is the raison d'être of higher education and as international educators, we take our role seriously in graduating students who have international knowledge, relevant skills, and experiences that will help them succeed in the global twenty-first century. Although it feels quite natural to invest much of our time and resources into student services, our long-term success with advancing education abroad, however, may not exclusively be found there.

At many U.S. universities or colleges today, the faculty own and control the curriculum, and any real success in advancing education abroad as a high-impact educational practice will be found by working with, and through, the faculty. In her influential 2010 book, The Twenty-first Century University: Developing Faculty Engagement in Internationalization, Lisa Childress makes the case that faculty engagement is the key to realizing our calls for comprehensive internationalization (2010). Childress explains that we need to critically examine the communication channels between central international offices and faculty, stating that often what is communicated can be quite different from what is understood. The communications feedback loop can be distorted by inconsistent messaging, inadequate or incorrect information, and as is discussed herein, a misalignment of purpose and direction. Clear and effective 360° communication with the faculty is key to effectively reposition education abroad as a function of student services to the academic core of an institution.

Overcoming the Golden Rule

For years, education abroad professionals have struggled with communicating the importance of education abroad to the faculty, lamenting that if only the faculty were fully engaged, more students would be able to participate. We take great strides at trying to engage the faculty with helping us realize our goals. Although existing education abroad research is often methodologically problematic and leaves much to interpretation, we regularly make definitive claims to the faculty that education abroad supports a vast array of learning outcomes, including intercultural competency, career readiness, and global citizenship, to name only a few (Salisbury, 2012). We do this because we yearn to see the faculty cheerleading for our success.

In our evangelism, we appear to have embraced the Golden Rule, which goes something like this: "Do unto others as you would have them do unto you." In the *video clip* cited below[12] , the education abroad professional follows the Golden Rule as he engages the faculty representative in a discussion of her unit's education abroad enrollment.

In this simulation, the education abroad professional basically assumes that the faculty member on behalf of her academic unit is similarly committed to education abroad programming and implies an obligation on part of the unit to increase education abroad enrollment. In fact, he directly confronts the faculty member with the question, "What can you do to get these numbers up?" During the discussion, he suggests that the academic unit do more promotion and student outreach, expand program offerings, and change degree structures. Although the simulation may be somewhat exaggerated, it is no doubt reflective of the exuberance that many of us have for education abroad. If only the faculty members would be more supportive!

Embracing the Platinum Rule

An alternative is the Platinum Rule: "Do unto others as they would have done unto them." In the education abroad context, this may be better expressed as, "Do unto the faculty as the faculty would want done unto them." From this perspective, a more effective approach would be to focus on understanding the motivations of the academic units and how to leverage international education as a means to support the realization of their goals. Questions such as, "What do you need from me?" and "How can I help you?" may be more effective with nurturing collegiality, respect, and open communication. In the *video clip* cited below[13], the education abroad professional utilized the Platinum Rule as he engages the faculty representative in a discussion of her unit's education abroad enrollment.

In this alternative simulation, the education abroad professional is much more collaborative and respectful, providing helpful background information in an attempt to better understand the goals and directions of the academic unit. In this case, he very clearly asks, "Is there anything you want from me?" He inquires about the mission of the academic unit and its goals for education abroad programming, exploring how he might better align and extend the resources of the central international office to support the academic unit's work. The key is to disentangle individual agendas to sincerely and respectfully understand the goals and directions of the broader academic unit and assist however needed or wanted in the realization of those efforts.

The Assumption of Difference...and Multiple Realities

There can sometimes be an antagonistic relationship between central international offices and the faculty, which may be more pronounced these days, given the growth of short-term, faculty-directed programming. For example, education abroad professionals are sensitive to concerns regarding student health, safety, and security and with institutional risk management and compliance, which in turn can be tedious, confusing, and frustrating for faculty members that long for the 'good ol' days,' when there were fewer bureaucratic hurdles. Balancing accreditation standards and curricular demands, more academic units are prioritizing faculty-directed programs as a preferred education abroad program model that does not rely on transfer credit. This, in turn, can be met with concerns by education abroad professionals over cost, academic relevance, cultural assimilation, language acquisition, student access and equity, and so on.

Central international offices who leverage the Platinum Rule, with the sincere goal of supporting the faculty in realizing (and shaping) their international education goals will benefit from improved 360° communication and clearer alignment of purpose and direction. In doing so, it is important to expect significant differences between academic units and be prepared to identify the multiple perspectives and realities that these academic units hold with respect to education abroad programming. It is essential to meet regularly with the faculty, especially as curricular needs and directions change over time, particularly in units with a strong focus on industry trends. What follows are four key positioning questions to consider when working with the faculty and thoughts on how to maximize the success of these encounters.

1. **Why is Education Abroad Important?**

   The fundamental rationales for education abroad programming have expanded over time (Ogden, 2017). For many faculty members, the importance of education abroad programming has long-been situated in language acquisition and cultural knowledge. For others, education abroad is more about developing intercultural competence and producing global-ready graduates who are able to work effectively in intercultural settings. With the growth of short-term programs, an increasing number of faculty members recognize the importance of graduating students who understand the international dimensions of their chosen disciplines and the need to establish and nurture global networks to support future study and/or professional interests. Short-term programming has also spurred the growth of international internships, global service-learning, and undergraduate research. For many, education abroad is increasingly associated with developing career readiness, civic engagement skills, and international research networks.

   When working with the faculty, it is important to quickly assess what perspectives are valued and then to align subsequent messaging and communications accordingly. If the academic unit is focused on disciplinary content, for example, it would be most advantageous to focus on messaging and programming wherein disciplinary-specific learning is held paramount. Professionally-oriented fields of study may be more responsive to education abroad programming that encourages students to work effectively in intercultural settings. Whatever the rationale, it is key to move forward together with a shared sense of purpose and direction.

2. **Who Owns Education Abroad?**

   As faculty-directed programming gained in popularity, it became protocol at many institutions for individual faculty members to develop and implement recurring education abroad programs that they individually "own" and "control." Over time, the tendency is that these programs eventually fall away through faculty attrition or lack of continuing interest or availability. Today, it is increasingly common and more sustainable to move away from programs that are individually developed and maintained in favor of programs that are organized and facilitated at the academic department level, in which individual faculty members rotate with each iteration or cycle. Program development and decisions happen at the department level rather than with any one faculty member. In this way, internal program competition is minimized and students who plan their academic coursework accordingly are more assured of program offerings at the appropriate academic junctures. This also allows academic units to

be more strategic and intentional about their education abroad offerings by developing or identifying programs that accentuate distinctive aspects of their curriculum or complement their curriculum in value-added ways.

3. How Do the Faculty Support Education Abroad?

When meeting with academic units, it is important to gauge the extent to which they are realistically committed to comprehensive internationalization. Do they have specific objectives and metrics that are being tracked? What measures are being taken to internationalize the existing curriculum? What strategies are in place to promote bilateral exchanges? One useful first step is to examine the four-year degree plan template for undergraduate students and note whether education abroad programming is mentioned. If not, it may be useful to begin by asking whether or not they actually want their students to participate, and if so, ask when they see it fitting best within the degree plan. Whether a full semester, or academic year abroad, or a summer between semesters, it is key to indicate when they think students should participate in an education abroad program and what ideal course work or programming should be sought. Work closely with the academic unit to develop and maintain an education abroad portfolio that aligns with this degree plan. This participatory process – one aspect of curriculum integration – provides a quick indicator of the seriousness and extent of the unit's commitment to international education.

4. What Motivates Faculty Members?

When presented with a challenging new project, administrative staff are humorously said to respond by first questioning the workload involved. Faculty members, however, are quick to inquire about the professional and personal benefits associated with the project. When it comes education abroad, for example, some faculty members may be attracted to summer salary supplements potentially available through faculty-directed programming, but most will consider how education abroad engagement relates to promotion and tenure aspirations, research and funding opportunities, international and interdisciplinary research networks, and so on. Senior academic leaders may be more concerned with how such programming advances student success metrics, international rankings, and institutional reputation, among other benefits. A crucial component to working successfully with the faculty is to couple international engagement with other driving factors that motivate them.

As Childress (2010) reminds us, the key to moving comprehensive internationalization from mere rhetoric to reality is by working with and

through the faculty. It would be a mistake to continue our tireless efforts to engage the faculty in education abroad programming on our terms and with our conditions. Rather, our efforts might be better placed when we go to them empathetically with ideas on how to strategically leverage education abroad programming as a means to support the faculty with shaping and realizing the international education goals they have for their students. By observing the Platinum Rule, our efforts must be to align our resources and efforts with the core academic functions of the institution, and in doing so, our collective efforts will be more sustainable and successful.

11 Originally published July 5, 2018, https://isatoday.wordpress.com/2018/07/05/expanding-education-abroad-through-faculty-engagement/

12 Golden Rule: https://www.youtube.com/watch?v=xnZBF4QpPfM, Produced by Mr. Seth Riker, University of Kentucky.

13 Platinum Rule: https://www.youtube.com/watch?v=WnJeze-iZJk, Produced by Mr. Seth Riker, University of Kentucky.

Re-Envisioning Partnerships: Collaborative Programming and Operational Management

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Developing and maintaining partnerships is a critical component of education abroad programming. It is essential to perform due diligence in selecting appropriate partners and establishing productive and sustainable relationships Before examining the five major partnership types, consider the four guiding principles for establishing partnerships.

1. Be intentional about forming partnerships. Give substantial thought about which stakeholders need to be involved in the development and maintenance of institutional partnerships. Campus-wide involvement is critical to the process of developing meaningful and sustainable partnerships.

2. Do the groundwork necessary to determine that partnerships will be mutually beneficial to all parties. Sustainable partnerships are multi-faceted and reciprocal. Consideration of the ways in which potential partnerships can be multi-faceted and reciprocal is important from their initial development and in their ongoing review to ensure the viability of the partnership and that it meets the collective needs of all parties.

3. Partnerships need to be sustainable. If partnerships are to be meaningful and sustainable, they will not require actions that work against normal institutional protocols or require excessive concessions, since doing so may jeopardize the viability of the partnerships and its sustainability once key campus champions are no longer involved.

4. Before establishing a partnership, determine how it will advance education abroad operations. If funding is core to the partnership, it is essential that it adheres to institutional practices and protocols around financial agreements and aligns with the needs and directions of the education abroad office.

This article provides a brief introduction and discussion of the strategic considerations in partnership development and management related to the five major partnership types: Providers, Exchanges, Consortia, Community, and Campus.

Providers

When partnering with providers, it is key to ensure that partnerships continuously support and extend education abroad operations and that the partnerships are synergistic and mutually beneficial. At best, providers are viewed as organizations with whom education abroad offices can co-manage a growing demand for education abroad programming. At worst, providers are viewed as third-party interlopers delivering the "hard sell" to students and faculty. Indeed, the provider landscape is a crowded and competitive one and it's easy for education abroad professionals to get lost in the provider alphabet soup. Sustainability in provider partnerships necessitates moving from mere transactional arrangements to synergistic partnerships built on mutual respect and collaboration (Holloway et al., 2019).

It may be useful for education abroad offices to build a targeted portfolio of providers that can be engaged in more manageable, intentional, and strategic ways. The need for portfolio streamlining is a growing issue in education abroad offices and it is important to note that such a refinement process not only considers the program offerings of any particular provider, but also the ability and willingness of providers to extend an office's capacity, advance operations, and assist in broader strategic planning (Ogden, 2015). Some examples include developing incentive-based funding mechanisms tied to student enrollment that can be used to support education abroad operations, creating scholarship funds targeting certain student populations or programs, and establishing School of Record partnerships. Becoming a School of Record for a provider can be complex but the financial gain for the education abroad office can be significant.

Another way to further engage provider partnerships can be to reevaluate how the provider engages on campus, including the possibility of establishing a permanent partner base on the home campus.

Exchanges

Bilateral and multilateral exchange partnerships provide financially accessible opportunities for students while increasing the international student presence on campus. Bilateral exchanges are between two institutions that focus on quid pro quo exchanges of students. Multilateral exchanges are between multiple institutions that do not rely on the balance between any two institutions, but all must balance at the institution-level the number of outgoing with incoming students within a predetermined network. As exchange partnerships mature, they may involve multi-faceted exchanges involving faculty, staff, and research.

Of all types of partnerships, exchanges yield far-reaching institutional benefits but may be the least likely to generate operational funding. However, it may be possible to re-examine one's institutional funding model for exchanges in ways that can generate revenue. For example, public institutions that assess tuition based on residency status differentials can accrue financial surpluses in exchanges accounts that can be in excess of the amount required to pay tuition and fees associated with maintaining exchange balances. In other words, if incoming exchange students are coded as in-state students, the tuition assessed of outgoing out-of-state students would be in excess of what is needed to equate the incoming student tuition. In this event, excess funds could be strategically reallocated. Some institutions use financial surpluses to create student scholarships, offer travel grants for faculty or staff members to

visit exchange partners, or to attend conferences or gatherings that directly support the on-going maintenance of exchange partnerships.

Consortia

Consortia-based partnerships enable institutions to collaborate and share resources that expand their education abroad capacity. Joining an education abroad consortium may be an effective means to increase operational and programming capacity, and generally without incurring new staff or financial resources. In particular, consortia can allow an education abroad office to:

- grow program enrollments with students from the partner network;

- reduce marketing expenditures by utilizing the network's marketing campaign;

- share the burden of program review with consortia partners;

- benefit from other consortium members' programs without incurring cost (e.g., faculty salaries);

- provide a broader range of education abroad program options;

- learn operational best practices from partner institutions; and

- enhance one's institutional reputation for international engagement through peer networks.

Consortia partnerships do, however, require institutions to give up a fair measure of autonomy as such partnerships require that members coordinate their policies, procedures, and operations. Such obstacles can be challenging – both politically and logistically – but the potential rewards are significant, particularly for under-resourced education abroad offices.

Community

Community partnerships, both locally and internationally, can provide crucial yet often overlooked resources to support education abroad operations. Some strategies include interfacing with international NGOs, government agencies, and companies abroad to offer internships; business visits; guest lectures; and other forms of in-country support. Negotiating with local businesses is also helpful in generating education abroad scholarships, event or office sponsorships, assistance with marketing and advertising, and so on. Enlisting alumni is also very effective, whether as spokespeople in education abroad marketing campaigns, potential donors, external advising committees, or as well-placed champions for education abroad. There are countless ways that education abroad operations can benefit from community partnerships when the relationships are nourished patiently and respectfully. Offices stretched to capacity frequently fail to prioritize community partnerships, but the expanded network of support through community partnerships can significantly improve an office's operational capacity.

Campus

Most education abroad offices depend on the cooperation and collaboration of a myriad of offices and units across campus. Building alliances are not only worthwhile, they are critical to success. Successful education abroad offices think strategically about campus partners and seek ways to align and reward

collaborative effort. Partnerships that are based on shared solutions and goals are more likely to be open to combining resources and efforts. Some strategies include inviting representatives from other offices to speak at regularly-scheduled education abroad office meetings to share their expertise and inviting campus representatives to serve on specific committees and task forces. Similarly, education abroad offices can seek ways to strategically collaborate and contribute to the success of other units on campus. In all, this collaboration can lead to resource sharing that in turns reduces the burden on existing staff and financial resources.

Conclusion

As outlined in this article, there are a wide range options to consider when developing a partnership portfolio around each institution's unique needs. It is critical that both the philosophy and the protocols of these partnerships are aligned. Furthermore, the vision and function of partnerships must be shared widely across the institution as a means to recruit dedicated advocates for education abroad. With a strong partner profile and consistent approach, internationalization will move from the periphery to the core.

CASE STUDY

The University of Tennessee's International Research Opportunities Program

NOAH ROST

As part of its reaccreditation process through the Southern Association of Colleges and Schools (SACS), The University of Tennessee (UT) launched a Quality Enhancement Plan (QEP) called International Research Opportunity Program (IROP). IROP emerged as a partnership between the Office of Undergraduate Research and the Center for International Education.

A core mission of the Office of Undergraduate Research is to match students with faculty or community-based research projects. In recent years, there has been a noticeable increase in the number of students that are seeking international undergraduate research opportunities. The Center for International

Education partnered with the Office of Undergraduate Research to develop a portfolio of international research opportunities to address this increasing demand.

Securing international research placements is a challenging undertaking in most cases, but particularly for those education abroad and undergraduate research offices that have limited staffing and resources. The one existing undergraduate research opportunity already offered at the time was through the EuroScholars consortium, which facilitates semester-length undergraduate research projects for U.S. students at several Western European universities. While a good option for some, many other UT students were seeking undergraduate research programs in the summer months that would allow them to "plug into" existing projects.

As such, the directors of the Office of Undergraduate Research and the Center for International Education reached out to International Studies Abroad (ISA) to discuss the possibility of developing a customized summer option that would meet the needs of UT students. This led to the development of an 8-week program that provides students opportunities to engage in research-intensive placements in six international sites. ISA secures the undergraduate research projects, which are vetted by the Office of Undergraduate Research. An introduction to research methods course is delivered online from the UT campus. A key component of the design is the ability of the university to retain both academic control of the coursework and the tuition revenue generated by student enrollment. In the interest of expanding the program and increasing accessibility, ISA has partnered with UT to develop a scholarship pool for students participating in IROP.

The IROP initiative demonstrates that partnerships are not one-size-fits-all. To achieve common goals, education abroad offices can and should engage partners on- and off-campus in a multitude of ways. Thinking creatively, asking questions, and soliciting support is fundamental to collective success. After all, few education abroad offices can be unilaterally successful.

Greenhouse Scholars: Cultivating Extraordinary Leaders To Change Low-Income Families & Communities

Andra Pool, Chief Relationship and Community Officer: Greenhouse Scholars

To broaden our perspective, ISA ThinkDen invited Andra Pool, Chief Relationship and Community Officer, to share information on Greenhouse Scholars, a local non-profit organization with a global reach. Andra shared information on some of the critical work Greenhouse Scholars does to bridge the accessibility gap in higher education.

The mission of Greenhouse Scholars is to create a community of leaders who will evolve the communities of the world. Essentially, the organization targets a distinct group of high-performing but under-resourced college students and young professionals and works to inspire, support, and drive them to change the trajectory of their futures.

There is a tremendous need for this work in higher education:

• Only 11% of first-generation, low-income students who go to college graduate (The Pell Institute, 2016).

• College graduates earn 98% more per hour than those without (up from 64% in 1983) (The New York Times, 2014).

• 2015 was the first time ever that a majority of public school students in the U.S. are considered low-income (51%, versus 33% in 1995) (Southern Education Foundation, 2015).

In short, the American Dream is largely just a dream: socioeconomic studies of intergenerational earnings elasticity show that among large and developed economies, the United States comes in last.

Greenhouse Scholars serves students from families experiencing poverty, homelessness, hunger, violence, abuse, incarceration, and addiction. They are also smart, motivated, ambitious, and want more for themselves, for their families, and for their communities. Ninety-five percent of Greenhouse Scholars graduate from college. They have experienced many of our country's most challenging issues first hand and, with our help, the Greenhouse Scholars implement solutions to those very issues – solutions that actually work.

Together with our Scholars, we have launched 20 new, distinct, non-profit organizations and over 200 research and community projects – to address the issues Scholars see as most critical in their own communities. These have included: a STEM education curriculum for girls in Ethiopia; a nutrition program for kids in New Haven; a college boot camp for middle school students in Denver; a solution improving vaccines for HIV; and research projects at NASA, Duke, and the National Institutes of Health.

Education abroad is potentially life-changing for all students, but especially for our Greenhouse Scholars who wouldn't get these opportunities elsewhere: Bashel Lewis is the only person in his entire extended family for 5+ generations to ever hold a passport, and Nadeen Ibrahim's experience in Greece informed her Mayoral appointment to the Denver Refugee Commission.

Thank you, to the education abroad community, for the work you are doing to create global citizens fluent in cross-cultural understanding. Together, we are – our students are – catalysts for lasting change.

To learn more about Greenhouse Scholars, please visit https://greenhousescholars.org/

Nadeen Ibrahim

Bashel Lewis

GREENHOUSE
SCHOLARS

Expanding Education Abroad Capacity Through Partnerships[14]

Anthony C. Ogden, Ph.D.: University of Wyoming

"WORK SMARTER, NOT HARDER,"

is a phrase many of us have heard throughout our lives, suggesting that the employment of more effective techniques or strategies will lead to greater success and productivity. Working smarter essentially means identifying our strengths and weaknesses and leveraging networks and partnerships to enhance our capacity and efficiency. At times, education abroad professionals bemoan their ability to get things done, frequently citing insufficient staffing, inadequate resources, and that expectations exceed capacity. So, what does it mean then for education abroad professionals to work smarter, not harder?

The reality is that we all have plenty to do, and most of us have grand designs for what we'd like to achieve at our institutions. Many education abroad offices are funded through annual allocations, provided centrally or through tuition and fee structures. Yet, irrespective of the funding model, most of us readily claim that insufficient funding and resources keep us from pursuing new opportunities. Rather than passively lamenting this reality, some offices are proactively pursuing revenue-generating activities. For example, fundraising, alumni outreach, and donor stewardship are perhaps the most common approaches, but such activities seldom generate operational revenue. External grant funding can also be leveraged effectively to launch new initiatives, but external agencies rarely provide funding for staffing and personnel needs. Although such strategies have certain advantages, particularly with regard to student programming, they seldom generate unrestricted revenue to support operational expenses.

In order to reach the level of desired operational, programmatic and financial stability, it is important for some education abroad offices to consider how to extend their capacity by establishing and leveraging networks and partnerships. Rather than focus solely on direct revenue generating activities, as many of us increasingly do, it is similarly important to focus on capacity building though networks and partnerships. What follows is a brief case study of when, earlier in my career, I found myself challenged to explore how to build my office's capacity.

Some years ago, I served as the Executive Director for Education Abroad and Exchanges at the University of Kentucky (UK). Like so many other

directors around the country at the time, I found myself pressured to increase overall enrollment and contribute to the institution's robust comprehensive internationalization agenda. As a primarily self-sustaining office funded through tuition and fees tied to enrollment, it was initially very difficult to calibrate the capacity and resources of our office with the rate of growth and expansion we were expected to achieve. Recognizing our capacity limitations, we chose to work smarter by leveraging new partnerships to realize our goals. The following are three brief examples of how we expanded our capacity through networking and partnerships.

Increase Your Enrollment

Education abroad providers have been working alongside universities and colleges since the beginning of the 20th century (Holloway et al, 2019). These organizations initially emerged as helpful collaborators in developing and facilitating education abroad programs. Today, they offer a wide range of specialized resources and services that contribute greatly to advancing education abroad programming and practice. Providers work in tandem with U.S. universities and colleges on initiatives that enhance portfolio diversification, advance new innovations in program development and design, promote strategies for enrollment management and student logistics, and mitigate health and safety risk factors, to name a few.

Not surprisingly, as pressures for expanded education abroad programming intensified at UK, our office naturally turned to our affiliated providers (partners) for support. To significantly increase enrollment, without further expanding staffing and resources, we needed our partners. We recognized early on that workload varies by program type, with faculty-directed and exchanges requiring additional staff time, and thus, we needed to maintain an optimal enrollment balance of 30-40% on partner programs. To help achieve this, we initiated a national RFP (Request for Proposal) to invite a provider to establish a permanent presence within our office. The goal was not to generate revenue or defer responsibilities, but to expand our capacity to increase overall participation.

After a comprehensive review process, led by our faculty and senior leaders, International Studies Abroad (ISA) was selected. The expanded partnership with ISA allowed the office to further its strategic objectives, maximize student and faculty support, and raise awareness about the value of education abroad. Over time, the partnership strengthened our ability to develop faculty-directed, customized programming and manage a robust team of peer advisors. The perpetual growth of enrollment even led to the creation of new scholarships and numerous sponsored initiatives.

Balance Student Exchanges

It seems that many institutions these days have the proverbial filing cabinet overflowing with memoranda of understanding that are either long forgotten or outdated and institutional exchange agreements that are woefully out-of-balance. UK was certainly no different, but we challenged ourselves to revitalize and balance our agreements. It was time to think differently.

At UK, our biggest challenge was not about attracting enough students to our outbound exchange programs, but with encouraging equal numbers of international students to choose the University of Kentucky out of the many possibilities available to them. As a native Kentuckian, I am aware that international students know little about Kentucky, and what they do know usually is laden with "Hillbilly" stereotypes. The long and rich history of thoroughbred racing in the state however is internationally well-respected and Lexington is regarded as the "Horse Capital of the World." Our intent was to leverage this resource as a means through which to balance our exchanges.

We turned to the Lexington's Sister Cities Commission for their support. By utilizing their extensive community network, we were able to secure internships at local horse farms for our international exchange students. Through this partnership, exchange students from certain partner institutions were able to choose between studying abroad, wherein they would take regular university courses, and interning at one of the many horse farms in Lexington. Coordinated through a revenue sharing partnership with Sister Cities, our exchanges were strengthened beyond anything that we could have done on our own.

Expand Partnerships in China

Our charge from the provost was clear: we were to build a stronger foundation at UK on which to increase the educational mobility of students to China. At the time, UK lacked a clear China strategy and very few colleges or departments endorsed programming in China. So, with the intention of raising awareness among the faculty of the potential for education abroad programming in China, we approached our campus-based Confucius Institute as a potential partner (Ogden & Maske, 2018).

Our plan focused on coordinating a two-week site visit to China in order to offer faculty members and senior leaders the opportunity to learn first-hand about Chinese higher education and to explore the potential for education abroad programming. There was simply no way that our office could do this alone and there was little funding available. With the support of the Confucius Institute, however, we received the approval and financial backing

of the Office of Chinese Language Council International (commonly referred to as "Hanban") to facilitate the visit. In total, 20 participants were selected, representing most UK colleges.

Prior to departure, participants attended orientation and planning meetings, and a series of workshops, which provided brief introductions to education abroad, Chinese culture, language and society, and higher education in China. Once in China, participants attended various lectures, visited a diverse range of established and emerging education abroad programs, and participated in cultural activities in Beijing, Tianjin, and Shanghai. Upon return, participants attended a series of debriefings to discuss the visit and develop college-specific action plans.

By all accounts, the site visit was successful. Participants expressed that they learned much about Chinese higher education and were motivated to support education abroad programming in China. Because the partnership with the Confucius Institute was such a success, Hanban invited UK to make this an annual activity. More importantly, the Confucius Institute and our office embarked on several new initiatives, including the creation of a grant program to fund the development and implementation of new education abroad programming in China.

What is common among these three examples was our intention to leverage external networks and partnerships to enhance our capacity. Our goal was not to directly raise revenue for our operations, but rather to pursue mutually reinforcing partnerships in response to real challenges that we could not have managed alone. We pursued partnerships with providers, community-based organizations and other offices on campus, all of which had a compelling interest to work with us. While seeking revenue generating initiatives is no doubt important, we found that, at least in these examples, we could reach our goals faster by working smarter, not harder.

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14 Originally published June 11, 2018, https://isatoday.wordpress.com/2018/06/11/ed-abroad-capacity/

Resources and Strategies for Securing External Funding

Penelope Pynes, Ph.D.: University of North Carolina Greensboro

Kim Priebe: North Carolina State University

As traditional means of governmental tertiary educational funding have diminished, education abroad administrators have sought out creative, entrepreneurial ways to secure external resources. While implementing new strategies can be challenging, many institutions have begun to pursue innovative approaches for securing eternal funding sources. This article will briefly outline some broad areas of focus and related strategies which may be replicated elsewhere. Institutional context will have a large bearing on the success of any particular initiative. Other important considerations are as follows:

- Any initiative must align with broader university goals (e.g., strategic plan, Capital Campaign, internationalization plans, or accreditation requirements). This alignment will ensure that other units understand these initiatives, thus engendering broader support.

- Consultation with key stakeholders and allies will enhance potential success.

- Seeking money for its own sake is not sustainable. It is critical to assess short-term and long-term repercussions to determine the viability of the initiative.

- Key stakeholders must be informed and prepared to engage ethically and broadly with the proposed initiative.

- Key milestones and success must be recognized to maintain momentum and sustained enthusiasm.

Education Abroad Alumni and Donors

There are key considerations in determining whether and how to work with education abroad alumni and other potential donors. For example, it is important to consider whether the investment of time and resources will pay off and if such an approach will come into conflict with broader institution alumni outreach and development strategies. Startup costs are similarly important considerations, such as assessing essential staff training needs and establishing partnerships with key campus units. Some activities are better suited as fundraising activities initiated by individual students rather than as broad strategies targeting resources to support education abroad operations.

- Host program reunions for alumni at the site of their education abroad sites, arranging for interaction with current students.

- Create an online giving site for one-time or recurring gifts.

- Host alumni-focused programming at existing education abroad locations.

- Host an auction targeting alumni.

- Host an annual alumni Giving Day phone-a-thon, where recent education abroad participants call alumni.

- Host an international alumni event abroad.

Partnerships

It can be very productive to pursue partnerships with education abroad provider organizations, partner institutions, and others that can be leveraged for resource generation. Such partnerships require vision, long-term planning, and an openness to unintended consequences. For example, it is increasingly common to assess a fee to provider organizations to attend education abroad fairs. While such fees can be a source of revenue to defray the cost of an event, these fees can also be a deterrent for some providers to attend, thus reducing student exposure to potential programming.

- Affiliating with select program providers may make the institution eligible for student discounts, conference fee waivers, site visits, and other benefits that have budgetary implications.

- Seek in-kind contributions and sponsorships that free up budgeted funds for other operational needs.

- When developing customized programming with affiliated partners, seek financial per-student enrollment incentives. For example, it may be possible to negotiate an amount in the form of unrestricted funds per program, plus additional money in scholarships per student.

- Enlist provider support with co-branded programming that can boost enrollment from external institutions and with developing course articulation databases, thus saving staffing resources.

- Seek additional staffing support through external organizations, such as the Long-Term Education Administrators Program (LEAP) managed by the University of Montana on behalf of Japan's Ministry of Education.

- Collaborate with international partner universities to jointly pursue and share funding opportunities, such as the Erasmus+ program.

Entrepreneurship

Provided the return on investment is clear, entrepreneurial engagement can be a very productive means to generate external resources. For example, becoming a School of Record for a provider organization can generate significant resources for education abroad operations. The Forum on Education Abroad offers useful guidelines for developing School of Record Relationships[15].

- Develop a revenue-generating inbound summer program or semester program for international student cohorts. Similarly, host faculty development or teacher-training seminars for international partner institutions.

- Earn revenue as a facilitating office for inventories such as Cultural Intelligence (CQ), Gallup's CliftonStrengths, and the Myers Briggs Type Indicator.

- Enroll external students on education abroad programs for a higher fee to support operations.

- Develop and market global education and travel merchandise for purchase, with proceeds to support education abroad operations.

- Assess an administrative surcharge to the international insurance plan that supports education abroad operations.

Sponsorships

Community and corporate sponsorships are another way to not only generate new revenue but also to reallocate or minimize the utilization of existing resources to achieve targeted outcomes.

- Develop public/private partnerships between partner universities, community agencies, and corporations to jointly collaborate on shared-interest programming.

- Establish partnerships with local corporations that have international offices that can assist with establishing international connections and program offerings.

- Create airline mileage programs where miles accrued via corporate travel are reallocated to the education abroad office, for faculty, staff, and student travel.

- Host public events in partnership with community and corporate sponsors where proceeds generate funding for education abroad.

Grant Funding and Governmental Assistance

Pursuing funding through grants can require considerable time and resources, but when successful, this work can generate revenue and opportunity that can have a significant impact on education abroad capacity.

- Consider graduate student assistance with grant proposal writing as these students regularly seek experience in this area.

- Seek funding assistance and support from U.S. Embassies and consular offices with in-country initiatives.

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15 Guidelines for School of Record Relationships, https://forumea.org/resources/guidelines/school-of-record-relationships/

North Carolina State University

KIM PRIEBE

North Carolina State University's (NC State) Office of Global Engagement, a 2014 Senator Paul Simon Award for Campus Internationalization recipient, established the Passport Services office[16] in 2016, a service that benefits not only the university but is an outreach initiative benefiting the community at large. Since the office opened in August 2016, the institution has processed 6,456 passport applications (as of July 2018). Of those applications, 2,192 were for students or employees; 1,229 were for families of current students, alumni, or employees; and 3,035 were for community members otherwise unaffiliated with the university.

NC State Passport Services became fully self-supporting within six months of its establishment. Designated Passport Acceptance Facilities such as this retain a $35 passport execution fee, which covers operating expenses and overhead. Additional revenue can be earned through passport photo services and related activities, which can be used to support international initiatives and student scholarships. For example, asking each passport applicant to round up to donate money to support global engagement can generate additional revenue.

For more information on how to become a Passport Acceptance Facility, https://travel.state.gov/content/travel/en/passports/requirements/where-to-apply/af-info.html.

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16 NC State Passport Services office: https://global.ncsu.edu/our-units/passport/

Effective Utilization of Data for Strategic Planning and Reporting

David Comp, Ph.D.: Columbia College Chicago

Data collection and reporting efforts on U.S. students abroad is not new and certainly such efforts, methods, and results have become more sophisticated over time. Education abroad historians and scholars suggest that possibly one of the first attempts to measure U.S. education abroad participation estimated that between 6,000 and 10,000 American students studied abroad in Germany between 1815 and 1914 (Abrams, 1968; Diehl, 1976). In 1949, the Institute of International Education (IIE) began to systematically collect and report on the international student enrollments in the United States but it was not until the 1980s that IIE began to collect enrollment data on U.S. students abroad. As the profession of education abroad grew and formalized, IIE made advancements to their data collection and reporting efforts and, in 1993, IIE began to include data on the race and ethnicity of U.S. students studying abroad for academic credit.

In 1999, Dr. Kathy Sideli of Indiana University, then chair of SECUSSA (Section on U.S. Students Abroad) of NAFSA, brought national attention to the importance of collecting accurate data on U.S. students abroad and encouraged all institutions of higher education to consistently report their enrollment numbers to IIE on an annual basis (Sideli, 1999). To a large extent, Sideli's efforts also highlighted to institutions the health and safety implications of knowing which students were abroad and where at all times (Sideli, 2000).

IIE made additional advancements in data collection and reporting from 2006-2007 when IIE made the decision to begin collecting participation data on students with disabilities (in collaboration with Mobility International USA). In 2008, IIE, the NAFSA Education Abroad Data Collection members, and the Forum on Education Abroad reached an agreement on the purpose for, and methodology behind, reporting national and institutional participation rates for U.S. students studying abroad (Cerosaletti, 2008).

Data collection efforts have certainly not been limited to issues of enrollment. Data collection on a wide array of topics is increasingly a function of education abroad offices. In the State of the Field (2017), for example, the Forum on Education Abroad identified the extent and rationale to which education abroad offices use data and assessment information, as follows:

- to improve or refine program content/design (63%)

- for reporting to university administration (57%)

- to advocate for education abroad (48%)

- for marketing purposes (44%)

- to determine program renewal (33%)

- to assess employee performance (19%)

Not surprisingly, the Forum's findings demonstrate that education abroad offices most often utilize data in relation to program development and design and for internal reporting and advocacy. Building upon these findings, ISA ThinkDen 2018 included a discussion of the current state of data collection and analysis in relation to education abroad operational management. The discussion referenced a framework developed by Ogden, Sideli, and Wiseman (2013), which focused on seven common requests for data that education abroad offices most often receive and the various ways to access, collect, analyze and share those data. As identified by Ogden, Sideli, and Wiseman, the seven most common requests at the time included:

1 Who are our underrepresented populations and how do we foster greater inclusion?

2 What are the college/department-specific priorities for education abroad and what information is needed?

3 Is our education abroad portfolio responsive to our institutional demographic?

4 Does education abroad impact persistence/retention? How so?

5 What role does education abroad have in student recruitment and admissions?

6 How do we monitor non-credit bearing international travel? Why should we?

7 How does financial need impact education abroad enrollment trends?

Many related themes emerged during the discussion in relation to these seven requests. In particular, the discussion yielded four broad considerations involved in data collection and a series of related questions for each that education abroad professionals should consider when utilizing data for strategic planning and reporting purposes.

1. **Consider the audience.**
   Who is asking questions and/or requesting data? What are their academic backgrounds? What types of data will they will find most useful? What subsequent questions may be raised by senior leadership?

2. **Consider the key issues facing the institution, division, or department.**
   What data will be most important to collect for advocacy purposes (e.g., student retention, graduate rates, employment outcomes, institutional loyalty, alumni giving, health and safety, program development and portfolio management, and staffing). What potential is there to conduct predictive analytics in these areas?

3. **Consider how data are collected.**
   What campus offices are essential partners? Who has access to and maintains essential data? What are the needed software platforms (e.g., ViaTRM, Terra Dotta, Qualtrics, etc.)? What other institutions or consortia could make good partners? Are there peer institutional benchmarks that should be consulted?

4. **Consider approaches to data visualization.**
   What software and tools are available on campus? What software and related platforms are accessible? What software platforms will integrate with existing institutional student information systems? What software and tools will best visualize the data (e.g., Tableau, Microsoft Business Intelligence, Access, etc.)? What is the ideal balance of quantitative and qualitative data?

Education abroad professionals today, more than ever before, have access to many tools that make it easier to collect, analyze and present data. In an age of information overload, it is important to remain mindful and take into consideration a variety of factors as we innovate and become more entrepreneurial in our education abroad operational management.

My Failed Advocacy Strategy

DAVID COMP

Throughout my career in the profession of education abroad, I have been a strong proponent of access, diversity, and inclusion in education abroad programming. For many education abroad professionals, the further diversification of education abroad enrollments is critical. Thus, in order to better understand our enrollments (at a previous institution), I prepared the following table to illustrate the racial and ethnic demographics of our students relative to national trends.

The data showed that we were below the national averages across some of the racial/ethnic groups, which led me to want to advocate for a strategy designed to increase student diversity. I shared the information with a senior administrator who could be a powerful ally for my efforts. After only briefly reviewing the data, the administrator quickly stated that the table basically aligned with what he already expected and showed no interest to act further on it.

Perhaps naively, I thought that presenting our institutional data in such a simple format would sharply convey the message that we needed to do more to serve the broad diversity of our students. To be sure, the data I presented was reviewed and understood, but I failed to provide additional and meaningful data to make a stronger argument that change was important and possible. My opportunity to rally support was lost because I did not fully consider who my audience was, the type of data I should present, and how to best present the data I compiled.

Comparative data by percentage of students

Race/Ethnicity	[Your Institution/ Program's] Enrollment	[Your Institution/ Program's] Students Abroad	U.S. Population 2008	U.S. Higher Ed. Enrollment 2008*	U.S. Students Abroad 2007-2008
Caucasian			79.8%	63.3%	81.8%
Black/African American			12.8%	13.5%	4.0%
Hispanic/Latino American			15.4%	11.9%	5.9%
Asian American			4.7%	6.8%	6.6%
Native American			1.0%	1.0%	0.5%
Multiracial			1.7%	Not Available	1.2%
No Response			X	X	X

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* Excludes Nonresident alien data

** U.S. Census data provides separate data on Hispanic/ Latino populations

*** Includes Hawaiian/ Pacific Islander populations

**** Includes American Indian/Alaska Native populations

Food for Thought: Responding to Education Abroad Trends

Caroline Donovan White: NAFSA: Association of International Educators

"CHEFS, OPEN YOUR BASKETS!"

On the popular Food Network show *Chopped*, the chef contestants are provided with a basket of jumbled ingredients and asked to create appetizers, main dishes, or desserts for the panel of discerning judges. The surprise foodstuffs in the basket would baffle the amateur home cook: sweetbreads, Kit Kats, kohlrabi, and gnocchi? Each is edible, but together they seem to be an unappetizing assortment. Somehow, the chefs make this mishmash into palatable (even delicious!) fare with added, familiar ingredients from the Chopped pantry.

Education abroad professionals, like Chopped contestants, often find themselves in high-pressure environments in which they must respond to management directives by leveraging their knowledge and available resources, however tangential those resources may initially appear. It is often futile to bemoan the lack of funding and support or harbor unrealistic expectations about what might otherwise be possible. With limited time and high expectations, education abroad professionals must be innovative and resourceful.

Like trained chefs, education abroad professionals must be open to new possibilities and different ways of doing things. It is important to identify the shifts and movements occurring within the profession in relation to the broader higher education context. Four trends appear particularly salient in education abroad programming today, although each manifests differently across institutional contexts.

1. **Targeted Programming**
    Education abroad offices are increasingly challenged to provide tailored programming to appeal to an increasingly diverse student population. This is particularly evident in new programming targeting first-year and transfer students and specific populations such as athletes, veterans, and online learners.

2. **Experiential Programming**
    Students are increasingly asking for education abroad program offerings beyond traditional study abroad, such as such as international internships, undergraduate research, and global service-learning. Developing and implementing such programming requires an expanded knowledge base that may not be common among education abroad professionals.

3. **Campus Engagement**
    Education abroad offices are increasingly expected to work collaboratively across distinct campus units to realize expanded and shared mandates. Many education abroad offices are now expected to not only track education abroad participation but to track and monitor all international travel, whether credit-bearing or not. This necessitates education abroad professionals to

work with an expanded array of campus stakeholders.

4. **Diminishing Resources**
   Many institutions across the nation are struggling to maintain existing operations with diminishing financial resources. Many universities have already begun to launch funding models that require their education abroad offices to be financially self-sustaining. Others are restrained by their existing financial models to respond to new opportunities or developments.

The temptation has been to respond to these and other trends with programmatic changes and adjustments to student service offerings. The more challenging and yet sustainable response would be to reform and adapt core education abroad operations by adjusting or modifying fundamental systems and structures to be more flexible and ready to capitalize on emerging and forthcoming trends and developments.

Capitalizing on Trends

How can an education abroad office successfully navigate these trends and thrive? What are some recipes for success in this dynamic environment? In his ISA Today articles republished in this report, Ogden provides food for thought with suggestions on managing partnerships, maximizing a budget, and supporting staff development. Additionally, there are strategies and innovations that might address the four trends noted earlier. The following may be useful strategies to respond to new trends and emerging developments in higher education.

- **Realign with the institution's mission**
  Rather than bewailing broadened mandates, some education abroad offices have found success in realigning themselves to the mission of the institution. An institutional mission statement may include few direct international references, but may include, for example, a directive to create opportunities for "engaged learning." Education abroad programming can easily be reframed in this way and, in doing so, institutional leadership may be more receptive and supportive of education abroad as a means to advance engaged learning. Finding such avenues to reinforce the institutional mission will bring new opportunity, support and advocates.

- **Develop a "yes/and" approach in response to new mandates**
  This tactic uses an improv method to show possibilities rather than constraints. In other words, "Yes, it would be great to [new initiative here] … and here are the resources we need to accomplish this!" A new mandate might seem like a burden on staff times and resources. Rather than begrudge the additional work, it might be possible to respond to the request with "Yes, I can help with that, and what if we used that data to [great idea]? This would require a part-time graduate assistant with a limited term contract. Could your office support that staffing to get this rolling?" This approach is encouraging and potentially engenders new resources.

- **Hire specialized or entry level staff for operational roles**
  Instead of fixating solely on additional permanent education abroad staff, some offices have found success in hiring hourly or temporary staff, peer advisors, interns, or recent graduates with database, marketing, or even clerical experience for functional operations. This frees more experienced (and more expensive) advisors to focus on the core of their work or increase their engagement on new initiatives.

- **Expand partnerships to build capacity.**
  Relationships across the campus connect an office with other units who can help update policies, share successful practices, provide training to staff, and pool operational or staffing resources to increase efficiencies and output. For example, a partnership with the campus career services office could lead to cross-promotion of education abroad and internship programming which could boost student interest among students not typically reached through education abroad outreach efforts.

- **Reduce to grow.**
  Many education abroad professionals are tempted to offer a multitude of programs to meet every possible student interest. Some institutions however have found that reducing the number of programs to a more manageable list, with focused partners, can increase enrollment. By eliminating the most expensive options or academically unsuitable options, for example, the portfolio of program offerings is less cluttered.

- **Use fund balances to broker new arrangements.**
  Tips for Reinvestment of Fund Balance Returns (Ogden, 2018) discusses issues related to fund balance returns. If it would be possible to retain all or a portion of fund balances, propose a plan for utilization. For example, it may be possible to project that the income earned from a certain number additional education abroad participants would be sufficient to cover a new employee's salary. With a focus on recruiting in that initial year, there is the potential to satisfy unmet student demand and likewise generate the revenue to support the position.

When the chefs on Chopped are given their baskets, they know that they must use those disparate ingredients, or face elimination – one can only control how to respond to the challenge, with grace or trepidation. It is time to reflect on education abroad trends, recall knowledge and techniques from years of experience, gather the main ingredients with gusto, and create some truly satisfying ideas. Just like on *Chopped*.

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