

THE FORUM ON EDUCATION ABROAD

Sample QUIP Guidebook for The Forum Quality Improvement Program (QUIP) Comprehensive Review

Please note: This sample Guidebook describes the philosophy, development and processes of the QUIP review. It does not contain the materials, content, and forms that are proprietary to the QUIP process

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I. Preface

A good evaluation and peer review of an educational program should fulfill many roles and functions. The two most common functions of a review are *quality assurance* and *quality improvement*. The first focuses on accountability and the second focuses on development, that is, continually improving a program so that students receive the most effective education possible. Both functions of an evaluation need to be met in order for the review to be successful and be accountable to wider constituencies, and to be useful to the leaders and staff of the organization.

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

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

Throughout the process of developing the Standards and QUIP, the focus has been on student learning and development. What do students gain by studying abroad? What is the value added of such experiences? How does a local campus or organization know from the evidence collected that the mission of the organization is being met? The documentation of student learning and development is the core of the self-study and of the peer review; in fact, it is to be

the beginning and ending of all reviews. Throughout the review process the organization makes a commitment not only to demonstrate its accountability, but also to show how it will function in the future, especially in matters of program improvement.

Further, the Forum is committed to honoring the unique mission of each organization and the context of each organization that participates in QUIP. The Forum's Standards accommodate a range of organizational strengths and future goals and needs. The Standards and the QUIP process allow for a variety of types of documentation and materials for helping each organization determine and communicate to others how it collects and uses evidence and knowledge of student learning and development that is consistent with its mission.

In designing the Standards and QUIP, the Forum wishes to stress that it will continue to work to make them more useful. We expect that over time, the Standards and the process of peer review will improve with implementation of the QUIP process. The Standards have already undergone two major updates, and have been piloted at over 20 organizations. The third edition was officially approved by the Forum's Board of Directors in July 2007. They represent the current thinking of the leaders of education abroad programs. Users should have confidence that these fundamentally represent the best collective thinking about what leaders of education abroad programs should address in examining their own programs and participating in the Forum's QUIP.

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

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

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

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

To provide continuity in terms of content projects, the Board soon added to its governance structure an Advisory Council (today known as The Forum Council). The first elections were held in July of 2002 and the Council's first task

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

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

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

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

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

In January of 2006 the Board of Directors created a Task Force on Standards to make a recommendation to the Board regarding the formal utilization of the Standards, in consonance with the Board's vote in January of 2004 to have a process created within three years. After much deliberation and consideration regarding a number of options, the Task Force recommended a process that is called The Forum's Quality Improvement Program (QUIP). This is very much in keeping with the directions in the field of higher education today which focus more on quality improvement than strict accountability models. QUIP will be useful to the wide range of institutions and organizations in the field of education abroad, which vary immensely in terms of their own self evaluation systems. QUIP offers a standardized approach to program and system reviews. Today, offices and programs often invite peers to evaluate their operations without access to an agreed-upon process or template. QUIP should quickly become the standard in the field for evaluating offices and programs. There are a variety of types of QUIP, depending on the scope of the review. All reviewers will undergo training so there is consistency with the evaluation processes. Institutions and organizations will also receive guidance regarding the self-study component.

The Forum recognizes that many individuals, institutions and organizations may have different opinions about the best way to apply standards in the field of education abroad. The current process reflects the work of many, many individuals and experts and has been democratic in nature from the start. While the process may not be perfect, it is the most deliberate, most focused and

most collaborative process of its kind that the field has known to date in the area of ensuring standards of good practice. We invite the Forum membership to support QUIP and to help make it the success it should be. Our students deserve no less.

III. The Forum Quality Improvement Program (QUIP)

The Forum 's QUIP program is designed to help organizations improve the quality of their international programming. From the outset, let us stress that this is not a compliance review or accreditation or certification process. The purpose is to help an organization improve the quality of its offerings and to think strategically about its future involvement in education abroad. That said, an organization may find it useful to link the self-study to a formal accreditation review of the organization, when one is conducted. QUIP addresses general

aspects of programming such as ethics and integrity, and organizational and program resources as well as specific dimensions of international programming related to education abroad for US students. In the broadest terms, the focus of the review should be on student learning and development in education abroad, and how an organization fosters this via its academic programs and administrative procedures. The two most important specific dimensions are the design, operation, and management of education abroad programs, and the operations of a education abroad office at a sending school in the US.

QUIP is intended primarily for:

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

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

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

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

Improving education abroad is a continuous process. It cannot be emphasized enough that one of the most important goals of the QUIP review is to build quality assessment and improvement into the basic procedures and the culture of the organization and its education abroad programs.

The Types of QUIP Reviews

The three types of QUIP reviews are:

1. Comprehensive Program Review

This base-line QUIP review is intended for institutions and organizations that offer Education Abroad Programs either exclusively for their own students, or for the wider US undergraduate market. Examples of institutions for which this review is appropriate include:

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

2. Review of Evaluation Processes

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

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

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

- A. A program provider with a well-established system for evaluating its programs;
- B. A college or university that has a well-established system for evaluating its Education Abroad Programs;

- C. An institution that runs very few, if any, of its own study abroad programs.

3. Guided Strategic Planning

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

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

The QUIP Process: Overview

The main elements of all QUIP review processes are:

1. The preparation of a Self-Study Report by a Self-Study Team appointed by the organization under review. Typically this team will include administrators, faculty, and staff.
2. A site visit by a Peer Review Team specially chosen for the expertise that they bring relevant to the review and vetted for any conflicts of interest. The members of the team may be education abroad professionals, faculty within disciplines taught at the study abroad site or other experts with experience appropriate for the review.
3. Preparation of a Peer Review Report by that team based on the Self-Study Report and the meetings and discussions of the Site Visit.
4. A response by the Self-Study Team, which may include correction of factual errors contained in the Peer Review Report, discussion of the Report's findings, an indication of any areas of disagreement, and most crucially, an indication of the organization's plans for future improvement.
5. A thorough review of both Reports by the Forum Review Panel (FRP), a group of senior education abroad professionals appointed by the Forum Board of Directors and Forum Council.

6. A final letter summarizing the findings of the QUIP review, written by The Forum to the organization.

The Forum's final letter includes a statement indicating whether or not the organization's education abroad programming, in light of its own mission and purpose, demonstrates substantial conformity with the highest quality education abroad practices as they are articulated in the Forum's *Standards of Good Practice for Education Abroad*.

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

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

IV. Instructions and Suggestions for Organizations

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

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

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

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

A) The QUIP Self-Study Team

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

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

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

B) Designating the QUIP Self-Study Team Leader

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

C) Preparing for QUIP

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

1. Build in Support
2. Plan Communication and Data Gathering

3. Establish a Timetable

D) Conducting the Self-Study

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

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

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

2. The Queries Worksheet

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

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

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

3. The Self-Study Report

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

Appendix 2 provides a sample of an organization's narrative Self-Study

4. Submitting the Self-Study Report

Once the Self-Study is complete, it should be submitted to the Forum Office electronically to: forumea@dickison.edu. If the documents are extremely large (greater than 1MB), they should be submitted on cd-rom. Please submit to the Forum office five copies of any publications, print material, supporting documents or other material attached as appendices that are not able to be distributed electronically. The Forum staff will distribute the Self-Study Report and appendix material to the Peer Reviewers.

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

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

5. The Role of the Forum Staff

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

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

6. Working with the Peer Reviewers

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

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

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

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

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

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

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

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

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

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

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

All those scheduled to meet with the Peer Reviewers should be thoroughly briefed by the Team Leader in advance of the meeting so that they are aware of the goals of the Site Review, know what the Forum is, and are familiar with the materials that the Peer Reviewers received.

E) The Peer Review Report and Organization's Response

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

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

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

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

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

F) The Forum Review Panel

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

1. Possible Outcomes of the QUIP Process

As stressed earlier, the QUIP process is not a pass/fail test. The result is not a simple yes/no answer. If we had to condense the possible outcomes to short answers, the two possible results would be “yes” and “not yet.” The Forum believes that all organizations have the capacity to conduct their programs in consonance with the Standards, and, as stated earlier, the Forum’s goal is to help each organization be the best that it can be. Therefore, a frequent outcome will be something like “yes, organization X’s operations and programs show a commitment to the *Standards of Good Practice*, and also we endorse the recommendations for improvement offered by the review team and commend them to the attention of the organization.”

2. Organizational Use of the Written Materials

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

3. Validity of the Review Result

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

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

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

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

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

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

H) Timetable

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

I) Checklist for Self-Study Team Leaders

V. Instructions and Suggestions for Peer Reviewers

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

A) Role of the Peer Reviewers

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

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

B) Ethical Behavior

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

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

C) Avoidance of Conflict of Interest

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

D) Confidentiality/Non-Disclosure

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

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

1. Keep all information confidential.
2. Refrain from discussing or seeking advice about a particular review from any person not associated with the Peer Review Team or not a member of the Forum staff.
3. Avoid discussing the name of a program or organization when you are in communication with colleagues outside the review, and do not relate information, even anecdotes, about the organization after the Site Visit.
4. Don't discuss specific information about other organizations during meetings and interviews; during meetings don't reference practices used at your own organization.
5. Don't use the visit for personal gain: don't promote yourself as a candidate for a job with the program or organization under review.
6. Don't use the visit for professional gain: do not use it to identify people you would like to hire, or proprietary practices you would like to adopt.
7. Don't give advice to the organization during the site visit, even in minor areas.

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

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

E) The Peer Review Team

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

F) Travel, Accommodation and Other Arrangements

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

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

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

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

The Standards The ultimate goal of the *Standards of Good Practice* is to establish a framework that will improve practices, such that students' international academic experiences are as rich and meaningful as possible. The

Standards recognize that there are no “one-size-fits-all” answers for how organizations and programs should address a broad range of study abroad issues. Students come from different backgrounds and a variety of disciplinary interests. It would make no more sense to impose monolithic standards on all international programs than it would to assume that all study abroad programs ought to aspire to identical educational goals. The Standards are designed to fit a wide range of program types including direct enrollment programs, hybrid programs, island programs, and field research programs.

The Queries

The strategy chosen by the Forum Council’s Standards Committee when it drafted the Standards, was to express them as a set of Queries rather than as prescriptive statements. This approach would allow for organizations to respond to the Standards in diverse ways depending upon the organizational context. Nevertheless, the Forum’s Standards do have broad expectations about the general characteristics of best practices in an education abroad program or service, and these are expressed in the headings and subheadings of the Queries. One of the tasks of the Peer Reviewers is to determine whether these fundamental expectations are met at the organization under review.

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

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

Quality Improvement

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

H) Prior to the Site Visit

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

Peer Review Team Leader responsibilities

Specific responsibilities of the Peer Review Team Leader include.

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

Responsibilities of all team members

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

I) During the Site Visit

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

Upon arrival

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

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

During the visit:

Interviews and meetings as established by the organization and the Peer Reviewers.

Before departure:

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

Suggested action points for the Concluding Meeting:

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

J) After the Site Review Visit

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

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

K) The Peer Review Report

In this section we provide general guidelines for the Peer Review Report. Peer Reviewers are asked to return one electronic copy of the Peer Review Report to

the Forum office (forumea@dickinson.edu). **Peer Reviewers should not send any materials directly to the organization under review.**

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

The Peer Review Report consists of two parts

1. A Follow-up Worksheet on which Peer Reviewers may comment on the organization's responses to the Queries.
2. A Narrative Report following the template

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

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

L) The Follow-up Worksheet

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

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

M) Template for the Narrative Report

Peer reviewers should use the template provided for the Peer Review Report (Appendix 6). The template is also distributed electronically.

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

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

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

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

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

VI. Glossary of Terms

Accreditation: A formal process, usually carried out by a government agency or an association specifically authorized to conduct accreditations, designed to attest to an organization's worthiness with respect to specified professional standards. QUIP is not an accreditation process.

Appendix: Any documents that the organization under review wishes to submit in addition to the Self-Study Report and the Queries Worksheet. Appendices can be submitted in electronic or hard copy. If submitted in hard copy only, five copies of each are required.

Boilerplate: General published or electronic material about the organization in general or about the education abroad programs. Any hard-copy boilerplate materials should be submitted in 5 copies.

Certification: An evaluation, usually of an individual, designed to officially state that the individual is qualified to perform some professional function. QUIP does not include any certification processes.

Compliance Review: A review designed to show that an organization fulfills certain specified conditions. QUIP is not intended as a compliance review

Confidentiality Agreement: A statement signed by Peer Reviewers agreeing not to disclose anything learned while reading the Self-Study or conducting the Peer Review or Site Visit.

Conflict Of Interest Statement: A statement signed by Peer Reviewers declaring any conflicts of interest known to them and agreeing to disclose any conflicts of interest that they may become aware of subsequently.

Constituent: Any individual or organization that participates in the activities of a program or benefits from them.

Curriculum Vitae: A document showing the education, work activities, professional activities, publications, etc. of an individual. Also known as a resume.

Education Abroad: Studying in another country; in the Forum context, this refers specifically the experience of undergraduate US students abroad.

Education Abroad Program: An academic program involving study, experiential programming, internships, research, and/or other educational activities in a formal setting in a country other than the home country of the students.

Final Letter: The letter sent by the Forum Review Panel to the organization under review at the conclusion of the QUIP process.

Forum Board of Directors: The Governing Body of the Forum on Education Abroad.

Forum Council: The elected body responsible for the Forum's program activities.

Forum On Education Abroad: A not-for-profit, non-governmental membership organization founded in 2001 for the purpose of promoting the interests of the education abroad field. The Forum is incorporated in Pennsylvania and Delaware. Its voting members are organizations. Collectively the member-organizations of the Forum account for more than 60% of the US students who participate in education abroad each year.

Forum Review Panel: A committee of education abroad professionals appointed by the Forum Council and Board of Directors to officially state the results of each QUIP review. Typically two members of the Panel will be assigned to read the Self-Study and Peer Review Reports, and draft the Final letter.

Follow-up Worksheet: An Excel worksheet which the Peer Review Panel completes, commenting on the items included in the organization's Queries Worksheet. (See also, *Queries Worksheet*. The Queries Worksheet and the Follow-up Worksheet are keyed to each other row by row.

Guidebook: A copyrighted publication of the Forum containing instructions and suggestions for organizations and for Peer Reviewers and templates for the reports.

Learning Objectives: A statement of what students are expected to learn in a program or specific course.

Organization: In this context, a college or university, third party provider or any other organization that provides, operates or manages education abroad programs. The organization at times referred to as 'the organization under review.'

Organizational Representative: The person designated by the organization as the individual in charge of the Self Study. The primary contact for the Forum and primary liaison with the Peer Reviewers.

Peer Review: An assessment of the Self-Study performed by a team of impartial education abroad professionals not affiliated with the organization.

Peer Review Report: The formal report written by the Peer Reviewers after the Site Visit. The Peer Review Report consists of a Narrative Report and the completed Follow-up worksheet.

Peer Review Team: Typically two peer reviewers who visit the organization and its programs and write the Peer review Report.

Peer Reviewer: An impartial education abroad professional appointed by the Forum to review an organization's Self-Study.

Pilot Project: The first implementation of the Forum's review procedures, which took place in AY 2005-2006.

Quality Improvement Program (QUIP): The Forum program designed to help organizations improve the quality of their education abroad programs and services, based on the *Standards of Good Practice for Education Abroad* first promulgated in 2004 by the Forum.

Queries: A set of questions that accompany the *Standards of Good Practice for Education Abroad* allowing an organization to provide substantial detail concerning its approach to each of the Standards

Queries Worksheet: An Excel worksheet distributed to the organization under review which the organization uses to provide answers to the Queries and to detail plans for future development.

QUIP: See **Quality Improvement Program**

Self-Study: The process undertaken by the organization under review to assess its programs and services, specifically in relation to the queries provided in the *Standards of Good Practice for Education Abroad*.

Self-Study Report: The formal report filed by the organization at the conclusion of the self study process. The report consists of a form, a narrative, and the completed Queries Worksheet.

Self-Study Team: The representatives of the organization who lead the Self-Study process.

Sending School: A college or university in the United States that sends one or more students to an education abroad program run by another organization.

Senior International Officer: The highest ranking individual on a campus who has overall responsibility for international programming activities.

Site Visit: A visit to an organization under review or to an individual program by a team of Peer Reviewers.

Site-Visit Information Packet: A packet of information prepared by the self-study team for the peer reviewers providing practical information for the visit.

Stakeholder: Any person or organization that has an interest in the success or failure of the organization being reviewed.

Standards Development Organization (SDO): An official designation given by the US Department of Justice to an organization that it recognizes as the official voice of a particular field or endeavor regarding standards of good quality. The Forum has been designated as a Standards Development Organization for education abroad.

Standards of Good Practice for Education Abroad: A set of standards developed by the Forum and endorsed by many US colleges and universities.

Standards Summit A meeting held at Dickinson College in November 2006 to review the experience of the Pilot Project and to discuss recommendations for the future implementation of the QUIP. Representatives of organizations that did self-studies and Peer Reviewers participated in the Summit.

Syllabus/syllabi: A document setting forth the content and other parameters of an individual course.

Team Leader: Person responsible for either the Self-Study or Peer Review processes.

Template: A Word document containing headers for a report. There are templates for both the Self -Study Report and the Peer Review Report.

Third Party Provider: An organization that manages (runs) education abroad programs for students other than its own.