

STATE OF THE FIELD SURVEY 2009

THE FORUM ON EDUCATION ABROAD

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The Forum is grateful to its members for their participation in this project.

The Forum State of the Field Survey 2009



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The Forum's State of the Field Survey is well established as one of the most important ways to find out about the very latest education abroad trends and issues. As the Forum membership continues to expand and become more diverse, this Survey takes on greater significance in representing the field of education abroad as a whole.

The Forum encourages its members and all institutions involved in education abroad to utilize this Survey to assess and improve their programs by:

- Assessing your education abroad practices by comparing them with those of other institutions and organizations. It is useful to analyze how your institution compares with the Forum membership on the range of topics presented in the Survey. For example, 76% of respondents report that they use the *Standards of Good Practice* to shape their education abroad policy. Does your institution or organization follow this practice? Would it be better off if it did?
- Improving your education abroad operations based on your analysis of what other organizations and institutions are doing. For example, most Forum member institutions (68%) include international education in their mission statements. This can be used as motivation to have your institution consider doing the same if it does not already do so.
- Planning for future program development and expansion by analyzing the information and trends revealed in these Surveys. U.S. and overseas institutions report that primary growth will occur in short-term programs while also expressing concerns about program costs and helping students to maximize their experience. What are the opportunities for assisting and partnering with institutions as they face these challenges related to short-term program expansion?

The State of the Field Survey is but one of many resources that the Forum provides to its members to advance the quality of education abroad programming. In addition, the Forum's publications, online resources, webinars, workshops and conferences, and the Quality Improvement Program (QUIP), together support the Forum's mission to improve programs in order to benefit the students who participate in them. The Forum thanks our colleagues who designed and analyzed the results of this Survey, Charlotte Blessing, Elise Rayner, and Kim Kreutzer, as well as the Data Committee and the Forum Council for their critical input.

Brian Whalen
President and CEO



The Forum on Education Abroad State of the Field Survey - 2009

In October/November 2009, the Forum on Education Abroad conducted its third State of the Field Survey. This survey provides an annual or biannual assessment of key education abroad issues and topics of interest to Forum members and the field of education abroad at large. Previous State of the Field surveys were conducted in 2006 and 2008, and the results may be viewed at http://www.forumea.org/research-data.cfm.

The 2009 survey was developed and designed by the Forum Data Committee with input from the Forum Council, and was then managed by the Forum Data Committee in conjunction with Forum staff. A survey invitation was sent by email on October 15, 2009 to each Forum institutional representative. As in previous years, a survey invitation was sent only to institutional representatives so that each institution could submit only one complete survey.

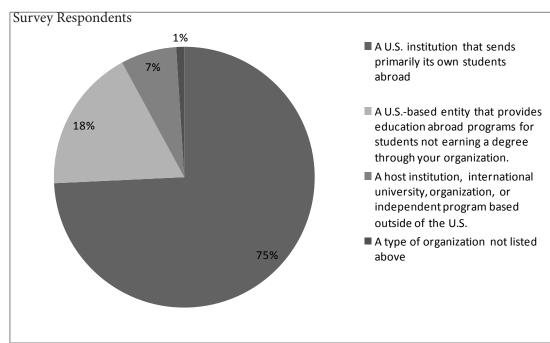
Members who received the email invitation were directed to a url link to the online survey. The survey was open through November 23, 2009. 345 members received the invitation to participate and 137 members completed the survey, for a 40% response rate.

Survey Highlights

- 1. The number of respondents that include international education in their institutional/organizational mission statements has steadily increased since 2006, from 54% to 68%.
- 2. 'Program costs and rising costs' continues to be the primary concern for the survey respondents.
- 3. Concern for academic quality has dropped from being the number 1 concern in 2006 to the number 5 concern in 2009.
- 4. U.S. and overseas institutions expect their primary participation growth to be in short-term programs. U.S.-based provider organizations expect their primary participation growth to be in semester programs.
- 5. Respondents' top overall concerns for short-term programming were 'program costs and rising costs' and 'helping students maximize their experience.'

Who Completed the Survey?

74% of the 132 survey respondents represent degree-granting U.S. institutions. 18% represent a U.S.-based entity that provides education abroad programs for students not earning a degree through their organization (i.e. what the field commonly calls "program providers"). 7% represent institutions or organizations outside of the U.S., and 1% represent educational institutions that did not fall into any of the other categories.





Comparisons to the 2006 and 2008 Surveys

The 2009 survey asked several questions that were also asked in the 2006 and 2008 surveys, yielding some interesting similarities and differences in the results.

Mission Statement

65% of all respondents to the 2009 survey indicated that international education is included in the mission statement of their institution or organization. This is a noticeable increase from the 58% who responded positively to this same question in 2008. In 2006, 54% of educational institutions reported that international education was included in their mission statements.

Standards of Good Practice

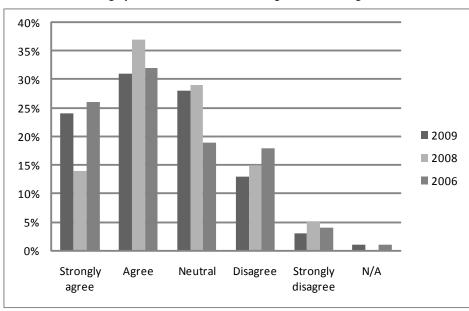
Respondents were asked whether they agreed with the following statement: "The Forum's *Standards of Good Practice* are being used to shape our organizational/institutional policy on education abroad." 76% either agreed or strongly agreed with this statement. Only 3% of the respondents disagreed

This is similar to the response in 2008 when 74% of respondents agreed or strongly agreed with this statement. In the 2006 survey (when the *Standards of Good Practice* were still relatively new) 63% of all survey respondents believed that the Standards would be used to shape their organizational/institutional policy on education abroad. It is interesting that more Forum members are using the standards for guidance on policy than was originally anticipated in 2006.

Open Doors

The survey asked institutional respondents how closely their institutions watch their positions in the tables published annually in the Institute of International Education's *Open Doors* report. 55% of the 2009 respondents reported they paid close attention to this. 58% reported paying close attention in 2006 and only 51% reported paying close attention to the *Open Doors* positions in 2008.

Institutions that pay close attention to their position in Open Doors





State Department Travel Warnings

The vast majority of respondents in 2009, 86%, consider State Department Travel Warnings a critical factor in deciding whether to operate or allow students to participate in study abroad programs in a given location. This is up slightly from previous results (83% in 2006 and 85% in 2008).

Overall Concerns in Education Abroad

Every survey so far has asked respondents about their top overall concerns in education abroad. The following table illustrates the respondents' concerns in each of the different survey years:

Top Overall Concerns in Education Abroad

•	2009 ranking	2008 ranking	2006 ranking
Program costs and rising costs	1 (tie)	1	3
Need for better funding	1 (tie)	3	6
Health and safety	3	n/a*	n/a*
Curriculum integration	4	6	2
Academic quality	5 (tie)	2	1
Adequate preparation of students	5 (tie)	5	4
Helping students maximize their experience	7	4	9
Disparity between student expectations and the reality of the	8	7	7
experience The commodification of study abroad	9	8	10
Increasing participation on short-term programs	10	10	8
Parent involvement	11	9	5

^{*} There was a separate question asking about health and safety concerns in 2006 and 2008.

It should probably not be surprising that 'program costs and rising costs' was tied with the 'need for better funding' for the top concern in the fall of 2009. Program costs and rising costs was also the top concern in 2008 and appeared at the #3 position in 2006.

Health and safety continues to be of great concern, complementing the increasing attention respondents indicate they place on State Department Travel Warnings.

Academic quality has taken a significant dip in level of concern since 2006, slipping from the number 1 concern in 2006 to number 5 in 2009. Curriculum integration is a greater concern in 2009 than overall academic quality.

The Forum's Code of Ethics

The Forum's Code of Ethics has been in circulation and also available on the Forum's website since 2008. The survey asked how institutions were using the Code and found that:

- 7% of respondents have adopted the Code as the governing code for education abroad
- 64% of respondents refer to and substantially follow the guidelines of the Code
- 24% of respondents have their own ethical guidelines
- only 1% of respondents found the Code to be of no help

Some respondents indicate that their institutions are planning to review the Code soon or in 2010. Time and lack of a proper committee were other obstacles to using the Code that were mentioned by respondents. Other ethical codes used by respondents include state ethical codes, NAFSA Best Practices, and internal honor and ethics' codes.

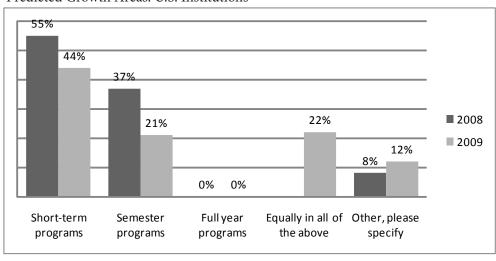


Questions on Study Abroad Capacity

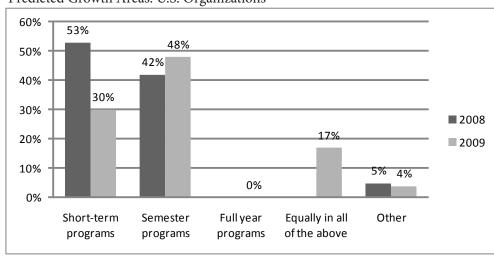
In 2009 we conducted a brief follow-up to the 2008 survey's capacity questions which were developed jointly with the Institute of International Education (IIE). The following charts summarize the predicted growth areas as reported by each of the three types of organizations surveyed: U.S. institutions, U.S. organizations and overseas institutions.

Interestingly, both U.S. and overseas institutions expect to see most of their student growth in short-term programs (44% and 50% respectively), whereas U.S. organizations believe that most of their student growth will be on semester programs. U.S. organizations changed their predictions significantly since 2008 when 58% of these organizations thought that the growth would primarily be in short-term programs. In 2009, only 30% thought that the primary growth area would be in short-term programming, while 48% of U.S. organizations thought that the primary growth area would be on semester-length programs.

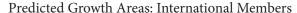
Predicted Growth Areas: U.S. Institutions

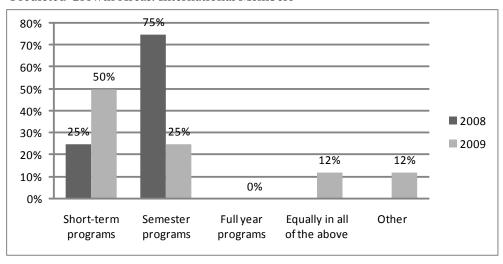


Predicted Growth Areas: U.S. Organizations









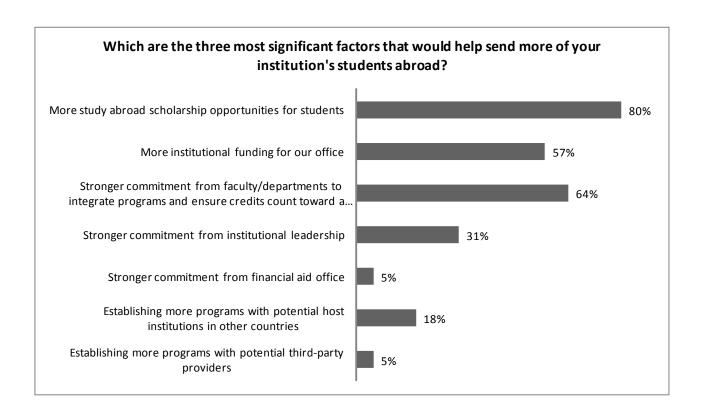
51% of survey respondents from U.S. institutions indicate they are actively trying to send a greater number of students abroad each year and 74% of U.S.-based organizations are also trying to increase their student enrollments. Some ways in which they are trying to accomplish this are by offering:

- new programs
- enhanced curriculum integration
- financial incentives and additional scholarship provisions
- more student outreach and marketing

In light of the global financial crisis, the Forum conducted in September 2009 a special survey about the financial crisis and its effect on education abroad. The results of that survey can be found on the Forum web site. In order to not be repetitive, the State of the Field Survey asked only one question about costs and resources: "Have costs and/or declining resources led your institution or organization to change its strategic plan for the coming year?" Most respondents, 68%, indicated that they have made changes, although for 74% of this group (or 50% of all respondents), the changes were slight.

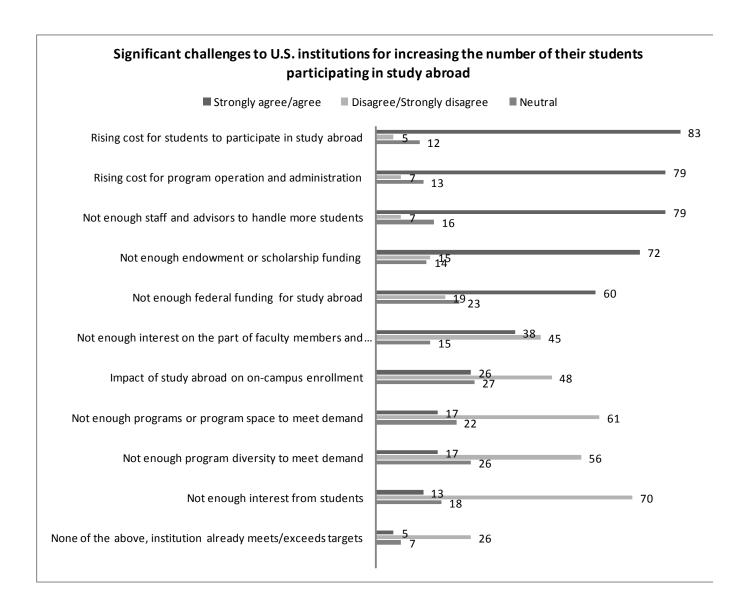


When U.S. institutions were asked what factors would help send more of their students abroad, respondents overwhelmingly agreed (80%) that more scholarship opportunities for students would help. This corresponds to the top responses about the major concerns for the field, namely, rising costs and the need for better funding. The second most significant factor that would help send more students abroad is also not surprising. 64% of respondents believe that they could send more students abroad if there was a stronger commitment from faculty/departments to integrate programs and ensure credits count toward a student's degree. The third most important factor for sending more of an institution's students abroad is more institutional funding for the education abroad office (noted by 57% of respondents).



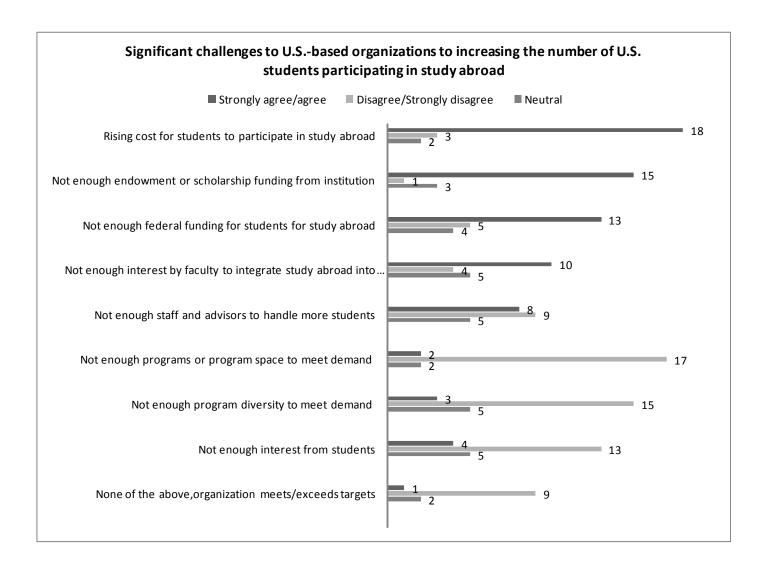


The survey asked respondents to report the most significant challenges their institutions face in trying to increase the number of students participating in study abroad. The cost, not enough scholarships and financial aid, and not enough advising staff were the top issues for U.S. institutions. The respondents also indicated that it is not a lack of student interest in study abroad that poses a challenge to increasing the number of students who study abroad. Program diversity is not a significant obstacle either, though it may be of some concern.



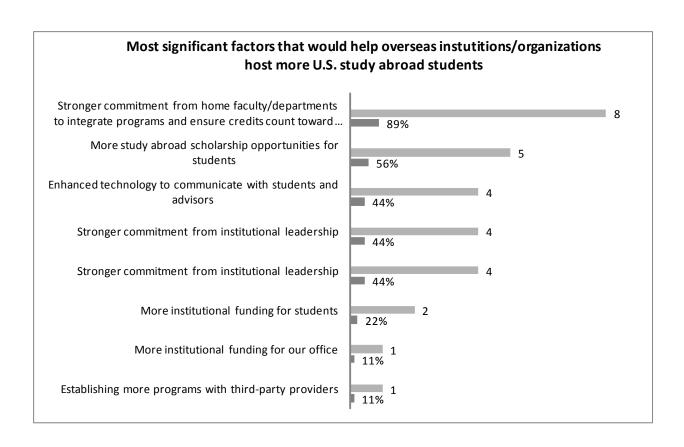


U.S.-based organizations offered a different viewpoint in reporting that programs, program space and program diversity are all significant challenges that they face in increasing the number of U.S. students abroad.





Although the sample of non-U.S. institutions and organizations was small, their responses are worth noting. They report that the integration of program credit at the home university is the most significant factor affecting their ability to host more students. Funding appears to be of much less concern for overseas institutions than it is for the U.S. based institutions. Comments indicate that smaller programs believe they cannot compete well with the corporate study abroad programs, and an unfavorable U.S. dollar exchange rate is also mentioned as a challenge for being able to host more students



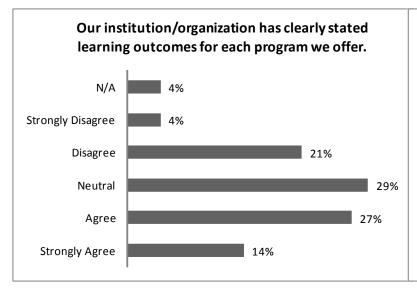


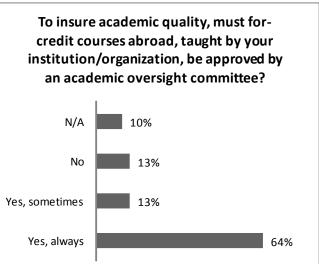
Approval, Design and Management of Programs

For the first time, the survey asked about learning outcomes and credit approval, and whether or not institutions take into account environmental, economic, and social consequences in the approval, design and management of programs.

Learning outcomes: Only 41% of institutions report that they have clearly-stated learning outcomes for each of their programs.

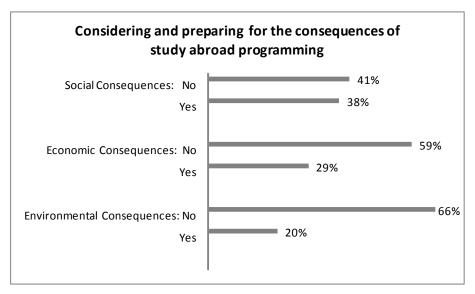
Academic oversight: 64% of respondents report that an academic oversight committee must always approve for-credit courses abroad that are taught by their institution or organization. 13% sometimes have these courses reviewed, but another 13% do not have their courses reviewed by an academic oversight committee.





Environmental, Economic, and Social Consequences of Study Abroad Programming

Three questions addressed how institutions consider and prepare for the environmental, economic and social consequences of a program's presence in the host country during the approval, design and management phases. Only 20% report that they consider environmental consequences, while 29% consider economic consequences. The area receiving the most consideration, by 38% of respondents, is the consideration of social consequences. Considering that many education abroad programs focus on language and culture and encouraging students' interaction with host nationals, it is perhaps not surprising that social consequences appears at the top of this list.



Short-Term Programming

A special focus of this survey is short-term programming in education abroad, the results of which are summarized below. Respondents were shown the definition of a short-term program from the Forum's Education Abroad Glossary as an education abroad program lasting eight weeks or less (may include Summer, January or other terms of eight weeks or less).

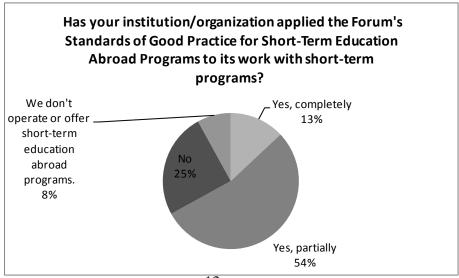
Types of short-term programming: For-credit classroom study was reported to be the predominant mode (85%) of short-term programming. In addition, a substantial percentage of short-term programs are non-credit activities such as service-learning, internship and volunteer opportunities. 8% of the respondents reported that they do not offer any short-term programs.



When programs are offered: The survey indicates that the majority of short-term programs (84%) are offered in the summer while 13% are offered during a January-term. Some programs (16%) are offered in either a May-term or during the regular academic year.

Program approval: In the development of short-term programs 70% of survey respondents adhere to the same principles as they do with longer-term programs. Slightly fewer, 65%, adhere to the same criteria in the approval of short-term programs as they do with their longer programs.

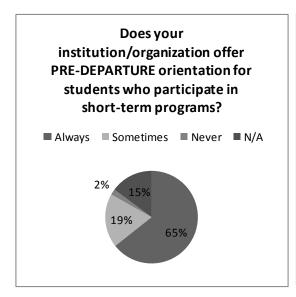
Forum's Standards of Good Practice for Short-Term programs: In January of 2009, the Forum published the Standards of Good Practice for Short-Term Education Abroad Programs. 67% of institutions report that they either partially or completely apply these Standards, while 25% said they do not. 8% responded that they offer no short-term programs.

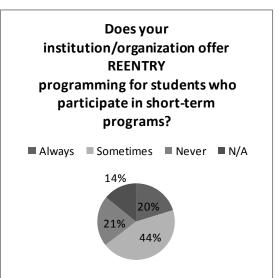




Resources for short-term programming: Given the growth in recent years of short-term programs, in the survey asked if institutions were funneling more resources into developing short-term rather than long-term programs. Only 26% responded that they are.

Pre-departure and re-entry support: The survey asked about student support in the form of pre-departure and re-entry programming for short-term programs. 65% of the survey respondents always offer pre-departure orientation for students on these programs, but only 44% responded that they always offer re-entry orientation.





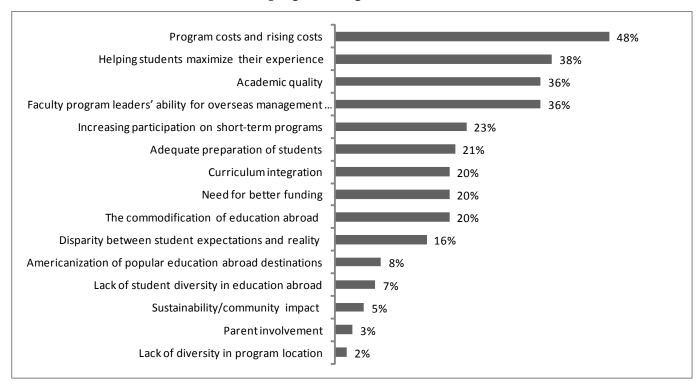
Overall concerns related to short-term programming:

The survey asked for the top three overall concerns related to short-term programming. Whereas institutions reported a need for better funding, program costs and rising costs, and health and safety as their top overall concerns for education abroad, the order of concerns shifted somewhat for short-term programming. For short-term programs, better funding did not make the list, but concerns about faculty leaders' ability to handle overseas management or student problems (which wasn't on the list of overall concerns in education abroad), as well as academic quality

While institutions indicate that helping students maximize their experience is of concern, re-entry programming (which might help students to maximize their experience) related to short-term programs is relatively uncommon.



Overall concerns related to short-term programming

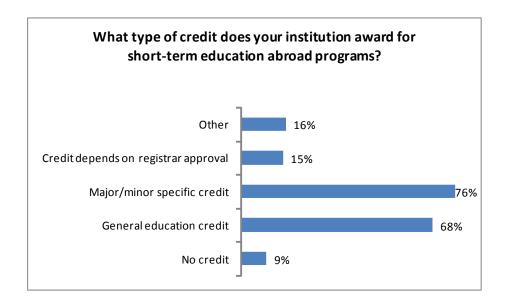


Ways in which U.S. institutions administer short-term programs: The survey asked U.S. institutions some specific questions about the types of short-term programming they offer, who advises students about these programs, and the types of financial aid available.

Credit in one form or another appears to be given for most short-term study abroad participation. Perhaps surprisingly, 76% of institutions report that credit earned in a short-term program can apply towards major and/or minor requirements. This may be due to short-term programs being more intentionally designed to offer one or two courses that focus on a particular location or theme, where credit will more easily transfer toward a student's major or minor. Departments and academic programs may be more willing to approve certain short-term programs for their respective minors and majors because of the focused content. If the short-term program is sponsored by the home institution and one of its own faculty teaches the course/s, the program may very well be treated as all other courses at the institution for the purposes of granting academic credit. The fact that credit earned on short-term study abroad is frequently applied to major/minor requirements could explain why institutions indicate that they are more concerned about 'academic quality' for short-term programs than they are for semester programs.

Advising for credit-bearing programs: The majority of institutions (88%) report that the campus Education Abroad Office does most of the advising for credit-bearing study abroad programs while 73% of institutions report that their students receive advising from faculty. Additional comments included in the survey reveal that students also receive advice from department and academic advisors. (Multiple answers were allowed for this question.)

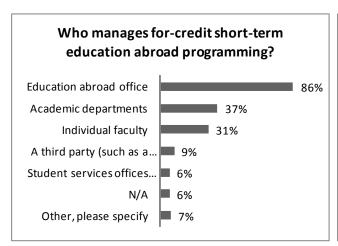


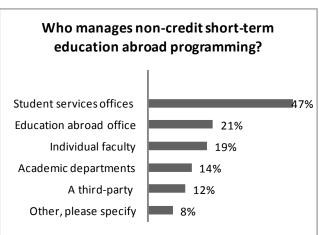


Advising for non-credit programs: For non-credit short-term programs, 56% of institutions report that other oncampus offices (e.g., Career Services, Service Learning Office, etc), do the advising for these programs. The Education Abroad office conducts advising for these programs only 29% of the time. (Multiple answers were allowed for this question.)

Program management for credit-bearing programs: 86% of institutions report that for-credit short-term programs are managed by the Education Abroad Office. 31% report that individual faculty members manage these programs. Only 9% of short-term programs are managed by a third-party. (Multiple answers were allowed for this question.)

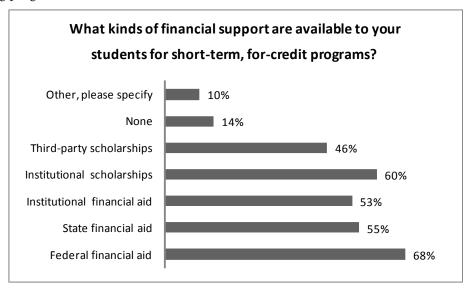
Program management for non-credit programs: Non-credit short-term programs are most often managed by student service offices (47% of the time). This corresponds with the advising home for these types of programs (see previous question on advising). (Multiple answers were allowed for this question.)





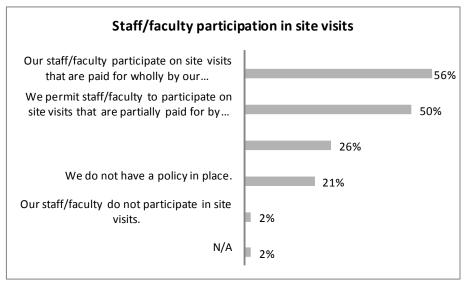


Financial aid: Various kinds of financial aid exist for students participating in short-term programs. Institutions report that in addition to federal and state financial aid, both institutional scholarships and financial aid are available, as well as third-party scholarships. The majority of provider organizations, 57%, report that they provide scholarships for short-term, credit-bearing programs



Site Visits and Program Evaluation

56% of institutions indicate that their staff/faculty participate on site visits that are funded entirely by their own institutions. 50% of all institutions permit staff/faculty to attend site visits that are partially paid for by program providers, while only 26% of institutions permit staff/faculty to attend site visits paid for entirely by program providers.



Less than half of institutions indicate that they have regularly scheduled evaluation procedures for each of their education abroad programs. The fact that 49% have no regularly scheduled evaluation procedures raises the question of how institutions exercise quality control. Several respondents indicated that their institutions rely only on student evaluations. Others indicated that their institutions are in the process of developing evaluation processes. 71% of the respondents indicate that evaluation results are not available to the general public.

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Marymount Manhattan College

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Swinburne University of Technology

Symplicity Corporation Syracuse University Tarleton State University

Tenon Tours Terra Dotta

Texas Christian University Texas Lutheran University Texas State University, San Marcos

Texas Tech University

Tompkins Cortland Community College

Towson University Transylvania University The Triad Group Trinity College

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University of Puget Sound
University of Queensland
University of Redlands
University of Richmond
University of Rochester

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University of the Sunshine Coast

University of Tulsa University of Virginia

University of Wisconsin-Eau Claire University of Wisconsin, Madison University of Wisconsin, Milwaukee University of Wisconsin, Platteville University of Wisconsin-Stevens Point

University of Wollongong

University Studies Abroad Consortium

Ursinus College

UPCES/CERGE-EI, Charles University

Vanderbilt University Vassar College Villanova University Wake Forest University Warren Wilson College

Washington and Jefferson College Washington and Lee University

Washington College

Washington State University Washington University in St. Louis

Webster University Wellesley College Wells College Wesleyan University

Western Connecticut State University

Western Oregon University

Wheaton College Whitman College Whittier College Whitworth University Willamette University Williams College Wofford College

Worcester Polytechnic Institute

Xavier University Yale University

ABOUT THE FORUM ON EDUCATION ABROAD

The Forum on Education Abroad is the only organization whose exclusive purpose is to serve the field of education abroad. Incorporated in 2001, the Forum holds 501 (c)(3) nonprofit status and is recognized by the U.S. Department of Justice and the Federal Trade Commission as the Standards Development Organization (SDO) for education abroad.

Forum members include US colleges and universities, overseas institutions, consortia, agencies, and education abroad provider organizations. The Forum membership includes more than 350 institutions that together account for approximately 90 percent of U.S. students studying abroad.

The Forum develops and implements standards of good practice, promotes and supports research initiatives, and offers educational programs and resources to its members. The Forum's members, represented by the Forum Council and its goals committees, determine the scope and direction of these initiatives. The Forum's annual conference is known for its distinctive format that fosters thought-provoking dialogue, and promotes collegiality and the vibrant exchange of ideas.

THE FORUM ON EDUCATION ABROAD MISSION STATEMENT

The mission of the Forum on Education Abroad is to promote high quality and effective education abroad programs on behalf of students at U.S. colleges and universities through providing opportunities for global discourse and information sharing among the educational institutions, faculty and staff, consortia, agencies and organizations that are its members.

By providing opportunities for discourse and information sharing, the Forum promotes high quality and effective programming through:

- · Advocating standards of good practice,
- · Promoting excellence in curricular development and academic design,
- · Encouraging outcomes assessment and other research,
- · Facilitating data collection, and
- · Advocating education abroad at all levels.

