

SMALL SCHOOL SHORT-TERM STUDY AWAY: A NOVICE'S GUIDE

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ABSTRACT

The purpose of this paper is to provide an overview of a process for planning and executing a short-term study abroad experience for individuals with no prior experience and with little or no institutional support for the effort. At larger institutions, there are probably entire offices that coordinate study away programs; however, at smaller institutions, it can often be left up to the faculty member(s) heading up the program to plan and execute the entire experience. This has a high level of risk especially for novices. We include a step-by-step planning process and a sample RFP used to collect data from vendors. We will share experiences about our successful implementation of the process taking a group of students to China in the summer of 2017.

INTRODUCTION

Planning and executing a short-term study abroad experience can be a daunting task. The purpose of this paper is to provide an overview of a process for planning and executing an experience for individuals with no prior experience and with little or no institutional support for the effort. If you are located on a college or university campus where study abroad (study away) is a high priority and you have many resources to help you successfully plan and execute short-term study abroad, this article is not directed at you. If, on the other hand, you are on a campus with minimal resources to support faculty planning and implementing a successful short-term study abroad experience, this article is for you. At larger institutions, there are probably entire offices that coordinate study away programs; however, at smaller institutions, it can often be left up to the faculty member(s) heading up the program to plan and execute the entire experience. This has a high level of risk especially for novices. In previous experiences we witnessed, student study away groups were stranded waiting for a bus that decided not to pick them up. In another case a bus arrived at a national border then the bus driver told the leader that he could not cross the border even though the itinerary clearly indicated a destination in another country. Lodging and meals that appear to be acceptable prior to the trip can be less than desired in reality. Having too rigid of a schedule can be just as bad as not having enough options for group activities. Either can cause student unrest and provide opportunities for trouble. As you can see, there can be significant pitfalls for a faculty member who is responsible for planning and executing study away trips. In order to minimize the risk and frankly the workload, we will walk through the process we used to plan and execute a very successful 12-day trip to China for business students. The process we used can be applied to any discipline.

CONTEXT

We are in a relatively small business school (20 faculty members) at a small regional, public university (about 5,000) undergraduate students. We have an individual who coordinates the study abroad process at the University-level, but mostly from an internal coordination perspective (ensuring the University's rules and processes are followed). This individual was very helpful at several stages of the process which we will outline later. Another aspect of our short-term study abroad program in the business school relates to the preparation class which is required. The program is offered every other year in the spring with the travel occurring after the spring semester ends in May. A third and significant aspect of this process is that we had to plan for a small number of student participants (Our planning model was for 8 students!) Finally, the faculty members leading this trip had no previous experience in leading a study abroad experience although they had traveled with student groups at other institutions.

PREPARATION CLASS

Every student who plans to enroll in the 1-credit-hour travel class in the summer must register for the paired three-credit-hour course in the spring. This class is an academic class covering the history, culture, business environment (it is a business class), and travel logistics and planning for the destination country or countries. From the faculty perspective this class serves as an excellent opportunity to ensure that students understand the environment they will be visiting as well as expectations for conduct and travel logistics. From the student perspective, they found the opportunity to “bond” over the spring semester very beneficial. The faculty teaching the class agree that this was a significant benefit since the students knew each other pretty well by the time we travelled. This particular aspect of the travel program is specific to our institution. However, we found the benefits of offering this class to be a great help in planning and implementing the trip.

PROCESS

In reflecting on the experience of the course and the trip, we identified the critical success factors in the process. The process included:

1. Discuss with your department chair, dean, or other appropriate administrator before you begin planning.

Once approved:

2. If your institution has a person responsible for oversight of study abroad meet with them and learn the process for your institution.
 - a. Learn and understand the study abroad rules for your institution including rules regarding “acceptable behavior of students.”
 - b. Discuss the possibility of using a request for proposal (RFP) or a previously approved external provider for the trip.

3. Identify the goal of the study abroad experience. Some goals might include:
 - a. Travel to see cultural sites
 - b. Interact with students in the destination country/countries.
 - c. Visit companies

4. Identify a destination or destinations you want the students to experience such as:
 - a. specific cities (Tier 1, Tier 2, etc.)
 - b. organizations
 - c. cultural/historical sites
 - d. consider modes of transportation to the initial destination and between international destinations. (Time factors can be critical here.)

5. Identify the minimal items you want included in the cost of the trip.
 - a. Lodging
 - b. Meals – breakfast every day and one other meal?
 - c. Local transportation?
 - d. Entry/Admission Fees?
 - e. Guides?
 - f. Tips for all drivers and guides
 - g. Study materials?

6. Prepare an RFP (It is a good idea even if you have one or more approved vendors.)
 - a. Be very specific about inclusions, options, exclusions, guarantees, fixed versus estimated costs in the proposal process.
 - b. If a true RFP is required, know how many bids you might need to get.
 - c. Have the study away person (if one exists) review the RFP
 - d. Have some informal conversations with prospective vendors.
 - i. Determine the viability of your plan.
 - ii. Discuss estimated costs.
 - iii. Understand minimum expectations of potential vendors.

7. Evaluate the proposals (using others on campus for help)
 - a. **Negotiate** with the best one or two to ensure the quality of the trip.
 - b. Get a final contract from the selected vendor.
 - c. Have it reviewed by legal counsel or purchasing to ensure compliance with rules.

8. Recruit your students.

9. Stay in touch with your vendor. Attend any of their conferences/meetings if possible.

10. Travel with minimal concerns!

With a relatively new study abroad coordinator for our small university on board, we took the opportunity to implement the plan indicated above and had a very successful short-term study abroad experience for the students and for the faculty members.

Prior to sending out the RFP, research was conducted to determine if the short-term study away was feasible and also to collect data. Research helped define which cities/countries to visit, which type of companies to visit and which cultural experiences to include. We decided on our rubric – which factors were necessary, most important, etc. in making our decision. One vendor included fixed price (minimum cost) on airline tickets while other vendors would specify a range and could not guarantee a minimum. Identifying possible vendors is something some may not have experience with. AACSB International Convention and Annual meeting and other conferences often have vendors attend. Identifying schools similar in size who have used these vendors in the past is helpful to validate the experience had by previous customers.

During the presentation as time allows, we will discuss what went well and what did not go as well as we would have liked. Preparation for a study abroad trip is key. Having a preparation class in the spring, an internal partner on campus as well as an experienced vendor on board with the process were critical to the successful study away experience.

APPENDIX

Sample RFP

Request for Proposal

ABC University
1000 University Drive
Anywhere, USA

Attn: Study Abroad Coordinator

The School of Business at ABC University is planning an international study trip to China in May of 2017. Your company responded to initial queries from Dr. Smith, the faculty member planning the trip. We would now like to request a formal bid from you.

We are required as a state university to obtain at least three bids for this trip. We ask for your response by October 7, 2016.

Key Personnel

The School of Business offers students the opportunity to study abroad on a biennial basis. This Global Viewpoint course will be led by Dr. John Smith, Professor, and Dr. Jane Smith, Professor. In addition, Study Abroad Coordinator Mary Jones will assist with collecting bids, recordkeeping, and financial concerns.

We expect a minimum of 10 students who will travel with the two faculty. In addition, we plan to open the tour to school alumni. Alumni may not attend the business visits but will follow the same city-to-city itinerary as the students. They will sightsee on their own for part of the time and with the students for specific sites or tours.

Itinerary Basics

- In order to work within the academic calendar, the trip should begin no earlier than May 8. It should last 12-14 days.
- Plans should include visits to 6-10 businesses, including some based in the U.S. with offices/plants in China, and some Chinese businesses which trade internationally.
- An English-speaking guide will be needed.
- The group will visit Shanghai, Xi'an, and Beijing, not necessarily in that order.
- **Faculty costs should not be included in the bid, since the School of Business will cover faculty costs.**

General Inclusions

- Any applicable domestic airfare
- All ground transportation, include transfers to and from the airport

- If an overnight train is included, private berths will be needed
- Student visits to 6-10 companies
 - If possible, lunches at the companies would be desirable
 - If possible specific information about those organizations would be desirable
- Lodging at 4-star hotels (unless 5-star hotels are less expensive)
 - No more than 3 students per room (double preferred)
 - Option for double rooms for couples
 - Faculty will share room
- Free breakfast at all hotels
- Some group lunches, as practical within the itinerary
- Welcome and farewell dinners in each city
- Optional travel insurance in case of cancellation

Sightseeing Inclusions-

- All tickets and fees should be included in the proposal. Both students and non-students should be included in all the following:

Shanghai

The Bund
Chenghuang Temple
Yuyuan Garden

Xi'an

Old City Fortress
Terra Cotta Warriors (at least a half-day)

Beijing

Forbidden City
Tiananmen Square
Great Wall
Silk Market (near Friendship Store)

Bid as Possible Additions (separate number should be provided for each):

- International airfare including taxes, fees, and fuel surcharges
- Information on visa assistance for those who need it

Exclusions

Exclusions should be given if applicable for expenses such as tips and gratuities, guide expenses, and meals that are not included in the proposal.

Concerns and Questions

- How will you arrange for travelers to exchange money?

- We do not want every meal to be a group meal; however, we foresee problems with handing out packets of money for meals, as some companies propose. Is there any reason that travelers can't exchange their own money and purchase their own meals on some days?
- What luggage restrictions will there be on all the types of transportation used?

Documents Requested

- Information about your company, as well as three references from other universities
- Payment schedule and timeline (Since this is a spring offering the earliest payment date must be in February)
- Flyers to advertise the trip
- Information we can share with the travelers, including travel/safety tips and background about sites included in the trip
- Additional sightseeing information for non-students who will have additional free time for exploration

Specifications

Please include prices for groups ranging from 10 to 30 travelers in increments of 5.

Evaluation and Award Process

Review of proposals will begin on October 10. Dr. John Smith, Dr. Jane Smith, and Mary Jones will select the bid based upon overall cost, value of inclusions compared to price, and appropriateness of businesses selected for visits.

We seek pricing in the area of \$3,500 (including international air transportation). Since cost is an important deciding factor, prices under this amount will be given additional consideration.

Contact Information

Please address questions and send proposals to:

ABC University
1000 University Drive
Anywhere, USA
Attn: Mary Jones, Study Away Coordinator

You may reach Ms. Jones at:
(Phone #) or MJones@abc.edu