

**STANDARDS
OF GOOD
PRACTICE FOR
EDUCATION
ABROAD**

Sixth Edition

THE
FORUM
ON EDUCATION
ABROAD

HOW TO USE THE STANDARDS

Standards of Good Practice for Education Abroad

We encourage you to read the book once from start to finish, then keep it on hand so that you can refer back to it whenever you need it.

Guiding Principles, Administrative Framework, & Student Learning and Development

Sections 4, 5, and 6 are the core components of the *Standards*. Each clause and sub-clause outlines an aspect of good practice in our field. Use the auxiliary verbs (shall, should, can) as a guide to the expectations set by each clause. See pages 6-7 for more information.

Need help?

Key terms are defined in Section 3. Search for clauses and sub-clauses on specific topics or challenges by referring to the Topical Index in the back of the book.

Prompts for Self-Assessment

This companion piece to the *Standards* guides you through a series of questions to assess programs and practices and identify areas of strength and room for improvement.

For more information and for examples of best practice shared by Forum members, visit www.forumea.org/standards

STANDARDS OF GOOD PRACTICE FOR EDUCATION ABROAD

Sixth Edition

The Forum on Education Abroad

Carlisle, Pennsylvania, USA

The *Standards of Good Practice for Education Abroad*, published by The Forum on Education Abroad, are the only standards established by the Standards Development Organization (SDO) for the field of education abroad recognized by the US Department of Justice and the Federal Trade Commission. For more information, visit www.forumea.org/standards.

© 2020 The Forum on Education Abroad. All rights reserved.

ISBN: 978-1-952376-04-7

Library of Congress Control Number: 2020934167

Printed in the United States of America

First Printing, 2020.

The Forum on Education Abroad

PO Box 1713

Carlisle, PA, USA 17013

The Forum on Education Abroad is hosted by Dickinson College.

www.forumea.org

STANDARDS OF GOOD PRACTICE FOR EDUCATION ABROAD

Sixth Edition

Introduction	1
Revising the <i>Standards</i>	2
Acknowledgments	3
How to use the <i>Standards</i>	6
1. Scope	9
2. Normative Reference	9
3. Terms and Definitions	10
4. Guiding Principles	22
5. Administrative Framework	26
6. Student Learning and Development	31
Bibliography	40
Annex: Topical Index	42

INTRODUCTION

This document, published by The Forum on Education Abroad, specifies minimum requirements, quality indicators, and a framework for continuous improvement for education abroad for US postsecondary participants. It is applicable to undergraduate, graduate, professional, and continuing education, whether for credit or not for credit.

The Forum on Education Abroad is recognized by the US Department of Justice and the Federal Trade Commission as the Standards Development Organization (SDO) for the field of education abroad. As such, it is The Forum's responsibility to monitor changes in our field of professional practice and to maintain, update, and promulgate the *Standards of Good Practice for Education Abroad* accordingly.

REVISING THE STANDARDS

During the fall of 2018, The Forum's Standards Manager and the Chair of the Forum Council formed the Standards Update Working Group. The Forum intentionally selected members to represent voices from diverse regions, institution and organization types, and constituents. The Forum released a Notification of Standards Development on October 11, 2018. To ensure even wider and more diverse representation, The Forum hosted a series of online listening sessions over the next six months, scheduled at different times of day. One listening session happened at The Forum's European Conference in Prague, Czech Republic, in October 2018, and another at The Forum's Annual Conference in Denver, Colorado, USA, in March 2019. The Forum collected information from any constituents who could not attend the listening sessions via a submission form available on the organization's website.

The Forum aligned the revision process with the core principles of due process for standards development as identified by the American National Standards Institute (ANSI): Openness, Lack of Dominance, Balance, Coordination and Harmonization, Consideration of View and Objections, Consensus, and Appeals. This included a public comment period on the first draft of the 6th Edition and the formation of a Consensus Body with a diverse membership. In this way, persons directly or materially affected by the *Standards* had the opportunity to have their voices heard in this important process.

After two rounds of voting and revision, consensus (42 affirmative votes; 1 negative vote) was reached by the Consensus Body on October 18, 2019. Following the appeals period, the 6th edition of the Standards of Good Practice for Education Abroad takes effect July 1, 2020.

ACKNOWLEDGMENTS

The Forum thanks the members of the Standards Update Working Group for their outstanding work in preparing the revisions represented in this edition:

Emily Gorlewski, *Wesleyan University, chair*

Abbiola Ballah, *Toucan Education Programs Limited, Belize*

Jennifer Betz, *Piedmont College*

Mieke Berg, *FIE: Foundation for International Education, United Kingdom*

Joy Carew, *University of Louisville*

Theresa Castillo, *Pellissippi State Community College*

Amelia Dietrich, *The Forum on Education Abroad*

Nico Evers, *EARTH University, Costa Rica*

Jessica Francis, *Wake Forest University*

Erin French, *Iowa State University*

Elizabeth Frohlich, *The Forum on Education Abroad*

Anne Haberkern, *Portland Community College*

Cheryl Lochner-Wright, *University of Wisconsin-Eau Claire*

James Lucas, *Michigan State University*

Gareth McFeely, *Boston University*

Natalie A. Mello, *The Forum on Education Abroad, Standards Manager*

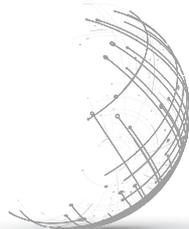
Sylvia Mitterndorfer, *William & Mary*

Kevin Murphy, *University of New Haven, Tuscany Campus, Italy*

Heidi Piper, *Griffith University, Australia*

Craig Rinker, *Georgetown University*

David Wick, *Middlebury Institute of International Studies*



As part of the process to update the *Standards of Good Practice for Education Abroad*, the Consensus Body is responsible for voting to approve proposed revisions to the *Standards of Good Practice for Education Abroad* and voting to reaffirm the *Standards of Good Practice for Education Abroad*.

The Forum thanks the following individuals for their service on the Consensus Body for the 2019–2024 term:

Lindsay Allen, *Yale-NUS College, Singapore*

Christopher Daniel, *Michigan State University*

Rosa Almoguera, *Edualamo, Spain*

Rebecca Davies, *University of Dallas*

Alejandra Barahona, *Universidad Veritas CIPSS, Costa Rica*

Pauline Day, *Wellesley College alumna*

Heidi Barends, *EDU Africa, South Africa*

Caroline Donovan White, *NAFSA*

Sarah Beaton, *Advanced Training and Research Division, US Department of Education*

Maria Doyle, *University of West Georgia*

Maritheresa Frain, *The Institute for Study Abroad*

Tracey Bradley, *Tennessee Consortium for International Studies/Pellissippi State Community College & Forum Council*

Annalease Gibson, *Albany State University*

Robert Hallworth, *IES Abroad & Forum Council*

Paige Butler, *Middlebury Institute for International Studies*

Kathleen Head, *Elmhurst College*

Enda Carroll, *University College Dublin & Forum Board of Directors*

Kimberly Hindbjorgen, *University of Minnesota*

Christina Carroll, *Florida State University & Forum Council*

Holly Hudson, *Texas A&M University*

Lucía Conte, *Universitat Pompeu Fabra, Spain*

Heilwig Jones, *Kaya Responsible Travel*

ACKNOWLEDGMENTS

Jonathan Kaplan, *Rothberg International School, The Hebrew University of Jerusalem*

Arden Kazan, *CISAbroad – Center for International Studies*

Sophia Krause, *Freie Universität Berlin International Summer and Winter University (FUBiS), Germany*

Sarah Langston Urbiss, *SAI Programs*

John Lucas, *ISEP – International Student Exchange Programs & Forum Board of Directors*

Blaise Maccarrone, *CIEE*

Monica Malhotra, *Mobility International*

Alex Markman, *Universidad Torcuato Di Tella, Argentina*

Amanda Milburn, *Global Education Oregon in London*

Jennifer Murray, *Bard College*

Michael Nelson, *University of Illinois at Urbana-Champaign*

Ken Nesbett, *Kirkwood Community College*

Carri Orrison, *Global Experiences*

Clare Overman, *Institute of International Education (IIE)*

James Pasquill, *State University of New York*

Chris Petrie, *Eastern Florida State College*

Pia Schneider, *Iowa State University & EUASA*

Gregory Spear, *Georgetown University*

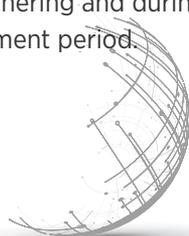
Tynelle Stewart, *University of Rochester & Forum Council*

Ann Margaret Themistocleous, *Anderson University*

Brigitte Thompson, *AIFS Study Abroad*

Jill Walker, *Global Vision International (GVI), Thailand*

The Forum also thanks the individuals who shared their feedback and suggestions throughout the period of information-gathering and during the public comment period.



HOW TO USE THE STANDARDS

The *Standards of Good Practice for Education Abroad* can be used as a tool to:

- guide program development,
- evaluate program quality,
- advocate for resources and support,
- train new professionals,
- educate stakeholders such as parents, faculty, students, etc.,
- establish and maintain respectful, sustainable relationships between partners.

While these *Standards* represent consensus in the field of education abroad at the postsecondary level for participants from US institutions, other constituents may find the *Standards* useful for informing their own practices. These groups may include primary and secondary educators providing education abroad programs to their own students and institutions and organizations offering education abroad programs for participants from countries other than the US.

The number and order of the clauses that follow do not imply hierarchy, importance, or a suggested order of operations. Use these *Standards* holistically.

Throughout the *Standards*, use this guide established by the International Organization for Standardization (ISO), to understand the expectations set by each clause [1]:

- **shall** indicates minimum requirements
- **should** indicates recommendations
- **can** indicates further possibilities for improvement

Definitions of frequently used and field-specific terms are provided in Section 3 for reference. In some cases, common words have been defined in order to ensure a shared understanding of how these words are used within the context of these *Standards of Good Practice* and to make the document accessible to readers who may have learned English as a second or foreign language.

Sections 4, 5, and 6 comprise the clauses and subclauses, the core of the Standards. Section 4 outlines guiding principles, which should be thought of as overarching and applying to the next two sections. Section 5 deals with the administrative framework for education abroad, and Section 6 deals with student learning and development, further divided into considerations for the phases before, during, and after study abroad participation. The Standards Update Working Group developed this structure to speak more directly to individuals, institutions, and organizations in many contexts and with varied influence or responsibility over the education abroad process. The structure lends itself to holistic use, rather than to a more fragmented approach, in which users choose discrete chunks of the *Standards* to focus on because those are the ones they consider to be in their purview.

Those who are accustomed to using previous versions of the *Standards*, or those who are looking for guidance on certain topics, will find the topical index in the Annex useful. For example, someone who is looking for information on health, safety, security, and risk management will find these topics not on their own in one particular section, but woven throughout Sections 4, 5, and 6. The index will give the specific clause(s) and/or subclause(s) where each topic may be found. The index will allow users to find specific information incorporated within the holistic *Standards* structure.

1. SCOPE

This document specifies minimum requirements, quality indicators, and a framework for continuous improvement for education abroad for participants from US postsecondary institutions. It applies to undergraduate, graduate, professional, and continuing education, whether for credit or not for credit.

2. NORMATIVE REFERENCE

The following document is referred to in the text in such a way that some or all of its content constitutes requirements of this document. For an undated reference, the latest edition of the referenced document (including any amendments) applies.

Code of Ethics for Education Abroad (The Forum on Education Abroad) <https://forumea.org/resources/standards-of-good-practice/code-of-ethics/>

3. TERMS AND DEFINITIONS

3.1. ASSESS

measure effectiveness through the articulation of *goals* (3.17), development of associated measures, and identification of observable outputs and *outcomes* (3.29, 3.30)

3.2. ASSESSMENT

process of measuring effectiveness, usually through the articulation of *goals* (3.17) and performance measures, the development of associated measures, and the identification of observable *outcomes* (3.29, 3.30)

Note 1 to entry: Assessment is usually used to inform whether the initial goals were achieved.

3.3. CO-CURRICULAR

relating to activities or events that complement or enhance *curricular* (3.9) *goals* (3.17)

Note 1 to entry: Co-curricular activities are typically non-academic in nature but relate other activities and experiences to the established curriculum or pedagogy.

3.4. CONTINUING EDUCATION

education available to adult, part-time *students* (3.45)

3.5. COURSE

unit of instruction

Note 1 to entry: In this document, course does not refer to a full degree program.

3.6. CREDIT

unit that colleges and universities use to record the successful completion of *courses* (3.5)

3.7. CREDIT TRANSFER

process by which *credit* (3.6) earned during *education abroad* (3.11) is transferred, approved, accepted, or otherwise validated by the *institution* (3.24) from which a student is seeking a degree

3.8. CRITICAL INCIDENT

any actual or alleged event or situation that creates a significant risk of substantial or serious harm to the physical or mental health, safety, or well-being of a *participant* (3.31) that requires a response by program *personnel* (3.34) or first responders, or an event that prevents a *participant* (3.31) from successful participation in the *program* (3.40)

Note 1 to entry: This definition is adapted from the North Dakota Department of Human Services Medical Services Division. [2]

Note 2 to entry: Critical incidents under this definition should not be confused with critical incidents in education, which refer more generally to experiences which cause stress and can serve as “teaching moments.”

3.9. CURRICULAR

relating to expectations and requirements for a program of study

3.10. DIVERSITY

individual differences (e.g., personality, learning styles, and life experiences) and group/social differences (e.g., race/ethnicity, class, gender, sexual orientation, country of origin, and ability, as well as cultural, political, religious, or other affiliations)

Note 1 to entry: This definition is by the Association of American Colleges and Universities (AAC&U). [3]

3.11. EDUCATION ABROAD

education, including, but not limited to, enrollment in courses, experiential learning, internships, service learning, and other learning activities, which occurs outside the participant's home country, the country in which they are enrolled as a student, or the country in which they are employed as *personnel* (3.34)

Note 1 to entry: Education abroad does not, in itself, result in a degree.

3.12. EQUITABLE

having or exhibiting *equity* (3.13); characterized by fairness; just and right; reasonable

3.13. EQUITY

creation of opportunities for historically underrepresented populations to have equal access to and participate in educational programs that are capable of closing the achievement gaps

Note 1 to entry: Adapted from the Association of American Colleges & Universities (AAC&U). [3]

3.14. ETHICS

moral principles that govern a person's behavior or how an activity is conducted

Note 1 to entry: As defined by the Oxford Dictionaries. [4]

3.15. EVALUATION

critical examination involving interpretation and judgment related to effectiveness and quality

3.16. FACULTY

person or people who teach *postsecondary* (3.37) *courses* (3.5)

Note 1 to entry: Faculty members may include all types of professors and instructors, regardless of tenure or type of contract.

3.17. GOAL

the final or ultimate aim towards which efforts are directed

Note 1 to entry: Achieving a goal will involve the development of a clear implementation plan of intermediary steps, each designed to build on elements of that goal.

3.18. GUIDELINE

general rule, principle, or piece of advice

Note 1 to entry: As defined by Oxford Dictionaries. [4]

3.19. HISTORICALLY UNDERREPRESENTED

African American, American Indian/Alaska Native, and Latino students who have historically comprised a minority of the US population

3.20. HISTORICALLY UNDERSERVED

populations of students who have not been recruited to participate in study or education abroad, including, but not limited to, LGBTQ+ students, students of color, undocumented students, non-traditionally aged students, and first generation students

3.21. IDENTITY

who a person is, or the qualities of a person or group that make them different from others

Note 1 to entry: As defined by the Cambridge Dictionary. [5]

3.22. INCLUSION

active, intentional, and ongoing engagement with *diversity* (3.10)—in the curriculum, in the co-curriculum, and in communities (intellectual, social, cultural, geographical) with which individuals might connect—in ways that increase awareness, content knowledge, cognitive sophistication, and empathic understanding of the complex ways individuals interact within systems and institutions

Note 1 to entry: As defined by the Association of American Colleges and Universities (AAC&U). [3]

3.23. INCLUSIVE

intentionally engaging with *diversity* (3.10)

Note 1 to entry: See also: *inclusion* (3.22).

3.24. INSTITUTION

entity that provides education as its main purpose, including, but not limited to, a school, college, university, or training center

Note 1 to entry: Such institutions are often accredited or sanctioned by the relevant national, regional, or discipline-specific education authorities or equivalent authorities. Educational institutions may also be operated by private organizations, including, but not limited to, religious bodies, special interest groups, or private educational and training enterprises, both for-profit and non-profit.

Note 2 to entry: Adapted from the UNESCO Institute for Statistics. [6]

Note 3 to entry: An institution may be referred to as an *organization* (3.28), but not all organizations are institutions.

3.25. LOCAL COMMUNITY

community in which an *education abroad* (3.11) *participant* (3.31) lives and/or studies

3.26. NOT FOR CREDIT

coursework or *co-curricular* (3.3) activities for which students do not earn academic *credit* (3.6)

3.27. OBJECTIVE

specific, measurable result used to work towards *goals* (3.17) and achieve measurable *outcomes* (3.29, 3.30)

Note 1 to entry: Objectives can be thought of as steps that are taken to achieve a broader *goal* (3.17).

3.28. ORGANIZATION

entity involved in providing *education abroad* (3.11) *programs* (3.40)

Note 1 to entry: An institution may be referred to as an organization, but not all organizations are institutions.

Note 2 to entry: A smaller part of an institution or organization, including an education abroad office or a global programs division, may be referred to as an organization.

3.29. OUTCOME, PROGRAM/PROGRAMMATIC

a measure of the results of a *program* (3.40) or service-level *goal* (3.17), e.g., increased satisfaction, increased retention

Note 1 to entry: Program outcomes are often used to include operational outcomes, which represent elements of the program's functioning (e.g., cost per student).

Note 2 to entry: Adapted from the Council for the Advancement of Standards, Glossary of Terms. [7]

3.30. OUTCOME, STUDENT LEARNING

statement which describes significant and measurable change occurring in students as a direct result of their interaction with an *organization* (3.28) and its *programs* (3.40) and services

3.31. PARTICIPANT

individual who attends, provides, or teaches an education abroad *program* (3.40), including, but not limited to:

- program leader
- on-site administrator
- student

3.32. PARTNER

party involved in the processes of sending *students* (3.45) abroad or receiving students abroad (when at least two parties are involved), including, but not limited to:

- home institution
- host institution
- independent provider
- consortium
- travel or logistics provider
- government agency
- scholarship organization

Note 1 to entry: Education abroad is by its very nature collaborative. Partner relationships are not always formal partnerships but working relationships with entities that may include, but are not limited to, travel agents or local transportation providers.

3.33. PARTNERSHIP

a formal or informal agreement between two or more *responsible organizations* (3.42) to manage and operate *education abroad* (3.11) *programs* (3.40)

Note 1 to entry: Partnerships may also be formal or informal agreements with vendors for provision of goods or services involved in the management or logistics of *education abroad* (3.11) *programs* (3.40).

3.34. PERSONNEL

individual(s) with responsibility for any aspect of the *portfolio* (3.36) or *program* (3.40), including, but not limited to:

- full-time and/or part-time *faculty* (3.16)
- hourly employees
- administrators
- staff
- paraprofessionals (e.g., student employees, interns, graduate assistants, and volunteers)

3.35. POLICY

plan to address anticipated conditions that guides and determines present and future decisions and acceptable *procedures* (3.38), including, but not limited to:

- reimbursement for early withdrawal
- student conduct
- admissions

3.36. PORTFOLIO OF PROGRAMS

set of experiences that include all specific *programs* (3.40) offered or approved by a *responsible organization* (3.42)

3.37. POSTSECONDARY

educational level following the completion of a school providing a secondary education, including, but not limited to, a high school, secondary school, university-preparatory school, gymnasium, home schooling at the secondary level, or General Education Development (GED)

Note 1 to entry: Also known as higher or tertiary education, postsecondary education is in the US taken to include undergraduate and postgraduate education. Colleges, universities, institutes of technology, and polytechnics are the main institutions that provide postsecondary education.

Note 2 to entry: Adapted from USLegal. [8]

3.38. PROCEDURES

a set way of doing something driven by the completion of a task with a focus on satisfying the rules, for example, in the event of:

- emergency evacuation
- response to sexual misconduct

Note 1 to entry: Adapted from ISO Terms Definitions. [9]

3.39. PROCESS

a series of actions completed to achieve a desired outcome, including, but not limited to:

- enrollment
- withdrawal

Note 1 to entry: Adapted from ISO Terms Definitions. [9]

3.40. PROGRAM

specific *education abroad* (3.11) experience, including, but not limited to:

- regular offering of a faculty-led or instructor-led experience
- ongoing direct exchange opportunity
- regular offering of a host institution abroad
- internship opportunity
- service learning experience

3.41. REASONABLE ACCOMMODATIONS

modification or adjustment to a course, program, service, job, activity, assessment, test, or facility that enables a qualified individual with a disability to have equal opportunity to attain the same level of performance or to enjoy the same benefits and privileges that are available to an individual without a disability

Note 1 to entry: As defined in Higher Education Law. [10]

3.42. RESPONSIBLE ORGANIZATION

entity responsible for the execution of a *program* (3.40) or *portfolio of programs* (3.36), including, but not limited to:

- university
- college
- program provider organization
- *partner* (3.32)
- education abroad office
- professional school

Note 1 to entry: The responsible organization may be different for each program or institution.

Note 2 to entry: See also *organization* (3.28) and *institution* (3.24).

3.43. RESPONSIBLE PARTY

individual responsible for specific task or *program* (3.40), including, but not limited to:

- advisor
- program leader
- education abroad director
- risk manager

Note 1 to entry: The responsible party may be different for each task or program.

3.44. RESTORATIVE JUSTICE

a philosophy that focuses on repairing the harm caused to people and relationships as a result of crime or other wrongdoing

Note 1 to entry: Restorative justice is “a victim-centered response to crime that provides opportunities for those most directly affected by the crime—the victim, the offender, their families, and members of the community—to be directly involved in addressing the harm caused by the crime. The restorative justice philosophy is based on (1) values that emphasize the support and involvement of victims and restoring emotional and material losses, (2) holding offenders accountable to the people and communities they violated, (3) providing opportunities for conflict resolution and problem-solving, and (4) strengthening public safety through community-building.”

Note 2 to entry: Definition and Note 1 adapted from USLegal.com. [8]

3.45. STUDENT

individual learner in an education abroad *program* (3.40)

3.46. STUDENT AFFAIRS

administrative sector or category of student support services that focuses on supporting student growth and development outside of the classroom

3.47. STUDENT LEARNING AND DEVELOPMENT

growth that is an intended outcome

Note 1 to entry: Student learning and development refers to the changes that result when students are exposed to new experiences, concepts, information, and ideas. The knowledge, understanding, and personal growth are generated, in this context, from interactions with higher education learning environments.

Note 2 to entry: Adapted from the Council for the Advancement of Standards, Glossary of Terms. [7]

3.48. ADDITIONAL TERMS AND DEFINITIONS

These and additional definitions related to the field of education abroad are available in the Glossary published by The Forum on Education Abroad. [11]

4. GUIDING PRINCIPLES

4.1. MISSION AND GOALS

Each organization **shall** write and distribute its mission, goals, objectives, and outcomes.

- 4.1.1. Each organization **shall** create and distribute a mission statement that defines the scope of its work, values, and aspirations.
- 4.1.2. Responsible parties **shall** ensure that educational objectives are central to program design and implementation and that the objectives support the mission and goals.
- 4.1.3. Responsible parties **shall** write and distribute goals, objectives, and outcomes for education abroad programming to partners and participants. -
- 4.1.4. Responsible parties **shall** evaluate the ways in which education abroad programming is or is not achieving its mission, goals, objectives, and outcomes.
- 4.1.5. Responsible parties **shall** assess the outcomes and use these findings for continuous improvement.

4.2. COLLABORATION AND TRANSPARENCY

Collaborations **shall** be equitable and transparent; they **shall** communicate goals and distribution of responsibilities to each responsible party.

4.2.1. Collaboration **shall** be based on mutual respect and be mutually beneficial.

4.2.2. Collaborators **shall** discuss and clarify:

- Compatibility of missions and alignment of goals, objectives, and outcomes
- Determining the objectives of the partnership
- Establishing respective financial responsibilities
- Assigning functional roles or tasks to responsible parties
- Establishing policies and procedures
- Managing health, safety, and security risks

4.2.3. Collaborators **shall** formalize all of the above in writing.

4.2.4. Collaborators **should** evaluate all of the above for continuous improvement and clarification of responsibilities.

4.3. ETHICS

Each organization **shall** collaborate and operate in accordance with ethical principles.

- 4.3.1. Each organization **shall** adopt the ethical principles and guidelines established by The Forum on Education Abroad or use an internal code of ethics that includes clauses related to all responsible parties involved in conducting education abroad activities.
- 4.3.2. Each organization **shall** prepare its personnel for ethical decision-making and practices.
- 4.3.3. Responsible parties **shall** conduct education abroad activities and advise students in an ethically responsible manner.
- 4.3.4. Responsible parties **shall** adhere to ethical practices in teaching, work, service/ volunteering, and research abroad.
- 4.3.5. Responsible parties **shall** make participants aware of the ethical implications of their academic work, activities, and interactions abroad.
- 4.3.6. Each organization **shall** promote respect for the cultures and values of all involved, including the communities from which the participants come and the communities in which they operate.
- 4.3.7. Each organization **should** consider the social, cultural, economic, and environmental impacts of its education abroad programming.

4.4. EQUITY, DIVERSITY, AND INCLUSION

Each organization **shall** prioritize equity, diversity, and inclusion.

- 4.4.1. Each organization **shall** establish equitable and inclusive policies and procedures.
- 4.4.2. Each organization **should** emphasize equity, diversity, and inclusion in program design, implementation, goals, objectives, and outcomes.
- 4.4.3. Each organization **should** develop structures to examine, identify, and address systemic biases and deficiencies in its policies, practices, and programs.
- 4.4.4. Each organization **should** ensure equitable access to education abroad.
- 4.4.5. Each organization **shall** establish meaningful contacts and connections with diverse partners, employ and enroll diverse participants, and foster inclusive communities.
- 4.4.6. Each organization **should** design its programs to provide opportunities for students to interact with broadly diverse peers, personnel, and members of local communities.
- 4.4.7. Responsible parties **should** assess student learning related to portfolio and program learning goals and disaggregate data by student demographics such as gender, socioeconomic status, race, and ethnicity to check for equitable outcomes for all students.

5. ADMINISTRATIVE FRAMEWORK

5.1. POLICIES, PROCEDURES, AND GUIDELINES

Each organization **shall** define policies, procedures, and guidelines to govern its programs and practices and prepare its personnel to apply them.

5.1.1. Policies, procedures, and guidelines **shall** be inclusive, equitable, transparent, and consistently implemented.

5.1.2. Each organization **shall** periodically conduct reviews to evaluate the application and effectiveness of policies, procedures, and guidelines.

5.1.3. Each organization **shall** have guidelines for program design, including, but not limited to:

- Support for educational objectives
- Relationship of curriculum to stated program goals
- Site-specific learning opportunities

5.1.4. Each organization **shall** have procedures facilitating program administration, including, but not limited to:

- Program proposal and approval process
- Recruitment and student selection
- Collection and analysis of program evaluations; distribution of results
- Regular review of ongoing programs

- 5.1.5. Each organization **shall** have policies and procedures in place that govern personnel matters, conduct, and training, including, but not limited to:
- Participant conduct management
 - Communication protocols
 - Participant health, well-being, safety, and security
 - Emergency management and response
 - Partner relationships, roles, and responsibilities
- 5.1.6. Each organization **shall** have policies that govern student matters, including:
- Academic affairs: course availability, assessment, credit transfer, grade conversions, grade appeals, research ethics, and academic integrity
 - Student affairs: student conduct matters, including, but not limited to, drug and alcohol use, mental health and well-being, culturally-sensitive behavior, sexual misconduct, travel, housing, disciplinary process, and appeal process
 - Student finances: financial aid, scholarships, program cost disclosure, payment, cancellation, and reimbursement

- 5.1.7. Each organization **shall** have policies and procedures in place regarding security and risk management that prioritize the health, well-being, and safety of students and personnel, including, but not limited to:
- Risk assessment and monitoring for program locations and activities
 - Tracking, responding to, and reporting critical incidents
 - Written emergency plans and protocols
 - Insurance coverage
- 5.1.8. Each organization **should** have guidelines governing its partnerships, including but not limited to:
- Establishing partnerships and formalizing collaboration
 - Responsibility for security and risk management
 - Managing privacy, confidentiality, and disclosure practices
 - Marketing practices
 - Partnership review

5.2. FINANCIAL AND HUMAN RESOURCES

Each organization **shall** be fiscally responsible and ensure that each program in its portfolio is funded and staffed to meet its goals.

- 5.2.1. Each organization **shall** commit to planning, delivery, evaluation, and assessment for continuous improvement.
- 5.2.2. Personnel involved in all aspects of the program **shall** be equitably remunerated, qualified, and trained for their roles to meet the program objectives for all students.
 - 5.2.2.1. Each responsible party **shall** consider local standards and cost of living when determining a fair and ethical level of remuneration.
 - 5.2.2.2. Each responsible party **shall** invest in training specific to program needs.
 - 5.2.2.3. Each responsible party **should** define “qualified” relative to the program needs, including, but not limited to, consideration of:
 - academic qualifications
 - professional certifications
 - experience

- 5.2.3. Each organization **shall** ensure workloads that enable personnel to support program goals.
- 5.2.4. Each organization **shall** provide risk management, preparedness, and emergency response measures for all programs and ensure insurance coverage is in place.
- 5.2.5. Each organization **shall** facilitate reasonable accommodations to enable students of varying needs and disability status to participate in education abroad.
- 5.2.6. Responsible parties **should** ensure that facilities and infrastructure, including housing, are suited to the goals of the program.
- 5.2.7. Responsible parties **shall** provide a safe environment that supports learning for all students.

6. STUDENT LEARNING AND DEVELOPMENT

6.1. BEFORE PROGRAM

Responsible parties **shall** prepare all students to be successful abroad throughout the program design, outreach, advising, application, and pre-departure processes.

- 6.1.1. Responsible parties **shall** keep specific learning outcomes and educational objectives central to program design.
- 6.1.2. Responsible parties **shall** communicate the value of education abroad for students' personal, academic, and career goals.
- 6.1.3. Responsible parties **shall** endeavor to recruit and advise students from all segments of the student population, including those who are historically underserved by their organization's programs.
 - 6.1.3.1. Responsible parties **should** develop strategies to increase participation by historically underserved groups.
- 6.1.4. Responsible parties **shall** communicate the importance of understanding the social, historical, political, economic, linguistic, cultural, and environmental context(s) for each program and location.
- 6.1.5. Responsible parties **shall** prepare students to participate in the curricular and co-curricular aspects of each program.

- 6.1.6. Responsible parties **shall** engage students in academic planning relevant to their studies and programs, including, but not limited to, consideration of:
- course equivalencies
 - credit and credit articulation
 - academic differences
 - assessment and grading
 - relevant career plans
- 6.1.7. Responsible parties **shall** evaluate student competencies and place students in language and other courses at their level.
- 6.1.8. Responsible parties **shall** communicate expectations for conduct and consequences of behaviors to participants.
- 6.1.9. Responsible parties **shall** prepare participants to navigate the cultural transition and to engage in culturally-relevant, ethical, and reciprocally-beneficial activities in relation to the local context.
- 6.1.9.1. Responsible parties **should** encourage students to consider the social, cultural, economic, and environmental impact of each program and to mitigate negative or harmful impacts.
- 6.1.9.2. Responsible parties **shall** communicate to participants the significance of identities including, but not limited to, racial, ethnic, sexual, gender, religious, ability, citizenship or nationality, and socioeconomic status in relation to the program context.

- 6.1.10. Responsible parties **shall** provide students with information related to accessing physical, mental, and emotional health and well-being services.
- 6.1.11. Responsible parties **shall** prepare students to manage their safety by providing resources related to concerns including, but not limited to:
- physical risks
 - behavior
 - property crime
 - liability and legal issues
 - sexual misconduct
 - identity-based discrimination
 - country-specific recommendations
- 6.1.12. Recognizing that not all countries have in place the same support and infrastructure as the home institution, responsible parties **shall**:
- clearly convey to students the importance of disclosing mental and physical disability status, accommodation, and other specific needs;
 - work with other responsible parties and students to determine how their needs may be met on the program;
 - and advise students on other program options if their needs cannot be met.

- 6.1.13. Responsible parties **shall** publish and provide full program cost estimates to students in writing prior to acceptance.
- 6.1.13.1. Responsible parties **should** provide information on financial topics, including, but not limited to:
- all costs of participation
 - financing options
 - financial aid
 - scholarships
 - loans
 - budgeting
 - currency conversion and exchange rates
- 6.1.13.2. Responsible parties **should** support students in identifying and accessing sources of funding, including competitive scholarships and grants.
- 6.1.14. Responsible parties **shall** prepare students to manage program logistics including travel, housing, and group dynamics.
- 6.1.15. Responsible parties **shall** communicate the need to obtain passports or alternative travel documents for students of all citizenship statuses.
- 6.1.15.1. Responsible parties **can** support passport and travel document procurement processes.

6.1.16. Responsible parties **shall** communicate the need to comply with host country immigration and/or visa processes for students of all citizenship statuses.

6.1.16.1. Responsible parties **should** support the immigration and/or visa processes with information and required documentation.

6.2. DURING PROGRAM

Responsible parties **shall** support student learning and development to achieve portfolio and/or program learning goals.

6.2.1. Responsible parties **shall** communicate to students their responsibilities for managing program logistics including travel, housing, and group dynamics.

6.2.2. Responsible parties **shall** communicate expectations for conduct, consequences of behaviors, and appeals processes.

6.2.2.1. Responsible parties **can** develop strategies to support conduct and behavior improvement, including reflective activities or restorative justice programming.

6.2.3. Responsible parties **shall** support students' understanding of the social, historical, political, economic, linguistic, cultural, and environmental context(s) for each program and location.

- 6.2.4. Responsible parties **shall** support students' participation in the curricular and co-curricular aspects of the program.
- 6.2.4.1. Responsible parties **should** support students in relating the experience to personal career goals.
- 6.2.5. Responsible parties **shall** support students to interact in a respectful, ethical, mindful, and sustainable way in the local community.
- 6.2.5.1. Responsible parties **can** provide students with opportunities to reflect on the social, cultural, economic, and environmental impact of their activities.
- 6.2.6. Responsible parties **shall** support students as they navigate identities including race, ethnicity, sexuality, gender, religion, ability, and socioeconomic status in the local context.
- 6.2.7. Responsible parties **shall** support students in accessing physical, mental, and emotional health and well-being services.
- 6.2.8. Responsible parties **shall** support students in managing their safety by providing resources related to concerns including:
- physical risks
 - behavior
 - property crime
 - liability and legal issues
 - sexual misconduct
 - identity-based discrimination
 - communication, social media use, and freedom of expression
 - country-specific recommendations

- 6.2.9. Responsible parties **shall** support students with accommodation needs related to disability status and identity and determine how their needs may be met in the program.
- 6.2.10. Responsible parties **shall** support students in obtaining and maintaining legal immigration status or direct them to appropriate resources.

6.3. AFTER PROGRAM

Responsible parties **shall** support post-program integration and application of academic, professional, and personal learning.

- 6.3.1. Responsible parties **shall** create opportunities for reflection.
 - 6.3.1.1. Responsible parties **can** provide occasions for students to share their experiences through opportunities including panels, photos, videos, essays, and research.
- 6.3.2. For credit-bearing programs, responsible parties **shall** support students in the course equivalency and credit articulation process.
- 6.3.3. Responsible parties **should** create opportunities for integration of learning abroad with future learning.
- 6.3.4. Responsible parties **shall** provide resources related to student mental and physical well-being related to program participation.

- 6.3.5. Responsible parties **should** prepare students to identify transferable skills developed through education abroad.
 - 6.3.5.1. Responsible parties **should** prepare students to communicate the value of education abroad to employers and other audiences.
 - 6.3.5.2. Responsible parties **can** offer leadership opportunities or ambassador programs for students.
- 6.3.6. Responsible parties **should** encourage continuing local and global engagement in culturally-relevant, ethical, and reciprocally-beneficial activities.
 - 6.3.6.1. Responsible parties **can** work with students to mitigate the social, cultural, economic, and environmental impacts of their travel experiences.
- 6.3.7. Responsible parties **can** inform students about opportunities to build upon their learning abroad experience, including, but not limited to, academic, governmental, and non-governmental programs, fellowships, and grants.

BIBLIOGRAPHY

[1] *How to write standards*. The International Organization for Standardization, 2016, <https://www.iso.org/files/live/sites/isoorg/files/archive/pdf/en/how-to-write-standards.pdf>. Accessed 30 Sept 2019.

[2] *Critical Incident Reporting Policy*. North Dakota Department of Health and Human Services, Medical Services Division, 2008, <https://www.nd.gov/dhs/info/pubs/mfp/docs/critical-incidents-reporting-policy.pdf>. Accessed 30 Sept 2019.

[3] “Making Excellence Inclusive.” Association of American Colleges and Universities, 2019, <https://www.aacu.org/making-excellence-inclusive>. Accessed 30 Sept 2019.

[4] *Oxford Living Dictionaries*. Oxford University Press, 2019, <https://en.oxforddictionaries.com/definition>. Accessed 30 Sept 2019.

[5] *Cambridge Dictionary*. Cambridge University Press, 2019, <https://dictionary.cambridge.org/us/dictionary/english/identity>. Accessed 30 Sept 2019.

[6] “Instructional educational institution.” UNESCO Institute of Statistics, 2019, <http://uis.unesco.org/en/glossary-term/instructional-educational-institution>. Accessed 30 Sept 2019.

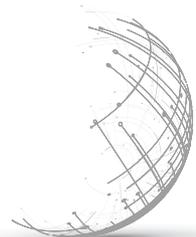
[7] “Glossary of CAS Terms.” Council for the Advancement of Standards, 2019, <https://www.cas.edu/glossary>. Accessed 30 Sept 2019.

[8] “Post-Secondary Education Law and Legal Definition.” *USLegal.com*, 2016, <https://definitions.uslegal.com/p/post-secondary-education/>. Accessed 30 Sept 2019.

[9] “ISO Terms Definitions.” ISO Quality Services Ltd., 2019, <https://www.isoqsltd.com/iso-terms-definitions/>. Accessed 30 Sept 2019.

[10] Nguyen, D. H. K. “Reasonable Accommodations: What Are They and Who Decides?” *Higher Education Law*, 2016, <http://www.highereducationlaw.org/url/2016/7/29/reasonable-accommodations-what-are-they-and-who-decides.html>. Accessed 30 Sept 2019.

[11] “Education Abroad Glossary.” The Forum on Education Abroad, 2019, <https://forumea.org/resources/glossary/>. Accessed 30 Sept 2019.



ANNEX: TOPICAL INDEX

Note: Index entries starting with the number 3 refer to definitions included in the Terms and Definitions section of this document.

Academics: 3.9, 4.3.5, 4.4.6, 5.1.3, 5.1.6, 6.1.2, 6.1.5, 6.1.6, 6.1.7, 6.2.4, 6.3, 6.3.2, 6.3.3, 6.3.7

Advising 4.1.3, 4.3.3, 4.3.5, 5.1.4, 5.1.6, 6, 6.1, 6.1.2, 6.1.3, 6.1.4, 6.1.5, 6.1.6, 6.1.8, 6.1.9, 6.1.9.1, 6.1.9.2, 6.1.12, 6.1.13, 6.1.13.1, 6.1.13.2, 6.1.15, 6.2.3, 6.2.4, 6.2.4.1, 6.3.5, 6.3.7

Assessment 3.1, 3.2, 4.1.5, 4.4.7, 5.1.6, 5.2.1, 6.1.6, 6.1.7

Budgeting: *see Resource Allocation*

Career Preparation 6.1.2, 6.1.6, 6.2.4.1, 6.3, 6.3.5, 6.3.5.1, 6.3.5.2, 6.3.7

Co-Curricular Activities 3.3, 3.26, 4.4.6, 6.1.5, 6.2.4

Code of Conduct: *see Student Conduct*

Conduct: *see Student Conduct*

Community Engagement 3.25, 4.3.6, 4.3.7, 4.4.5, 4.4.6, 5.1.3, 5.2.2.1, 6.1.9, 6.1.9.1, 6.2.3, 6.2.5, 6.2.5.1, 6.3.6, 6.3.6.1

Culture 4.3.6, 4.3.7, 4.4, 6.1.4, 6.1.9, 6.1.9.1, 6.1.9.2, 6.2.3, 6.2.5, 6.2.5.1, 6.2.6, 6.3.6.1

Curriculum: *see Academics*

Credit 1.0, 3.6, 3.7, 5.1.6, 6.1.6, 6.3.2

Not for credit 1.0, 3.26

Disciplinary Measures: *see Student Conduct*

Diversity: *see Equity, Diversity, Inclusion*

Environmental Sustainability: *see Sustainability*

Equity, Diversity, Inclusion 3.10, 3.12, 3.13, 3.22, 3.23, 4.4, 4.4.1, 4.4.2, 4.4.3, 4.4.4, 4.4.5, 4.4.6, 4.4.7, 5.1.1, 5.2.2, 5.2.5, 5.2.7, 6.1, 6.1.3, 6.1.3.1, 6.1.4, 6.1.9.2, 6.1.11, 6.1.12, 6.1.15, 6.1.15.1, 6.1.16, 6.1.16.1, 6.2, 6.2.3, 6.2.6, 6.2.8, 6.2.9, 6.2.10

Ethics 2.0, 3.14, 4.3, 4.3.1, 4.3.2, 4.3.3, 4.3.4, 4.3.5, 4.3.6, 4.3.7, 5.1.6, 5.1.8, 5.2.2, 5.2.2.1, 6.1.4, 6.1.9, 6.1.9.1, 6.2.5, 6.2.5.1, 6.3.6, 6.3.6.1

Evaluation 3.15, 4.1.4, 4.2.4, 5.1.2, 5.1.4, 5.2.1

See also: Assessment

Financial Aid: 5.1.6, 6.1.13, 6.1.13.1, 6.1.13.2

Global Learning: *see Culture*

Health, Safety, & Well-Being 3.8, 4.2.2, 5.1.5, 5.1.6, 5.1.7, 5.1.8, 5.2.4, 5.2.6, 5.2.7, 6.1.10, 6.1.11, 6.1.12, 6.2.6, 6.2.7, 6.2.8, 6.3.4

Host community: *see Community Engagement*

Housing 5.1.6, 5.2.6, 5.2.7, 6.1.14, 6.2.1

Inclusion: *see Equity, Diversity, Inclusion*

Intercultural Learning: *see Culture*

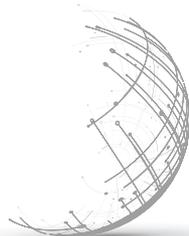
Language 6.1.4, 6.1.7, 6.2.3

Learning Goals & Objectives 3.1, 3.2, 3.3, 3.17, 3.27, 3.30, 4.1, 4.1.2, 4.1.3, 4.2, 4.2.2, 5.1.3, 5.2, 5.2.3, 5.2.6, 6.1.1, 6.2, 6.3, 6.3.1

Marketing 4.1, 4.1.1, 4.1.3, 4.3.3, 4.4, 4.4.1, 5.1.8, 6.1, 6.1.2

Mission and Goals for Education Abroad 3.29, 4.1, 4.1.1, 4.1.2, 4.1.3, 4.1.4, 4.1.5, 4.2.2, 5.2, 5.2.3, 6.2

On-Site Orientation 4.3.5, 6.2, 6.2.1, 6.2.2, 6.2.3, 6.2.5, 6.2.6, 6.2.7, 6.2.8, 6.2.9, 6.2.10



ANNEX: TOPICAL INDEX

Partnerships 3.32, 3.33, 4.1.3, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.4.5, 5.1.5, 5.1.8

Policies and Procedures 3.35, 3.38, 4.2.2, 4.4.1, 4.4.3, 4.4.6, 5.1, 5.1.1, 5.1.2, 5.1.3, 5.1.4, 5.1.5, 5.1.6, 5.1.7, 5.1.8

Pre-Departure 4.3.5, 6.1, 6.1.2, 6.1.4, 6.1.5, 6.1.6, 6.1.7, 6.1.8, 6.1.9, 6.1.9.1, 6.1.9.2, 6.1.10, 6.1.14, 6.1.15, 6.1.15.1, 6.1.16, 6.1.16.1

Privacy 4.3, 4.3.1, 5.1.5, 5.1.6, 5.1.7, 5.1.8

Professional Learning: *see Career Preparation*

Program Administration 5.1, 5.1.4, 5.1.7, 5.1.8, 5.2, 5.2.1, 5.2.2, 5.2.3, 5.2.4, 5.2.5, 5.2.6, 5.2.7, 6.2, 6.2.2.1, 6.2.7, 6.2.8, 6.2.9

Program Design 4.1.2, 4.4.2, 4.4.3, 4.4.6, 5.1.3, 5.2.1, 6.1, 6.1.1

Recruitment: *see Advising; Marketing*

Re-Entry: 6.3, 6.3.1, 6.3.1.1, 6.3.2, 6.3.3, 6.3.4, 6.3.5, 6.3.5.1, 6.3.5.2, 6.3.6, 6.3.6.1, 6.3.7

Resource Allocation 4.2.2, 5.2, 5.2.1, 5.2.2, 5.2.2.1, 5.2.2.2, 5.2.2.3, 5.2.3, 5.2.4, 5.2.5, 5.2.6, 5.2.7

Risk Management 3.8, 4.2.2, 5.1.6, 5.1.7, 5.1.8, 5.2.4, 6.1.10, 6.1.11, 6.1.12, 6.2.8

See also: Health, Safety & Well-Being; Security

Safety: *see Health, Safety, & Well-Being*

See also: Security

Security: 4.2.2, 5.1.5, 5.1.7, 5.1.8

Staffing and Human Resources 3.34, 4.3.2, 4.4.5, 4.4.6, 5.1, 5.1.4, 5.1.5, 5.1.7, 5.2, 5.2.2, 5.2.2.1, 5.2.2.2, 5.2.2.3, 5.2.3, 5.2.4

Student Affairs 3.46, 5.1.6, 6.1.8

See also: Student Conduct

Student Conduct 3.44, 5.1.6, 6.1.8, 6.2.2, 6.2.2.1

Student Development: *see Student Learning and Development*

Students with Disabilities: 3.41, 5.2.5, 6.1.12, 6.2.9

See also: Equity, Diversity, and Inclusion

Student Finances 5.1.6, 6.1.13, 6.1.13.1, 6.1.13.2

Student Learning and Development 3.30, 3.47, 4.1.2, 4.4.7, 6.1, 6.1.1, 6.1.2, 6.1.4, 6.1.5, 6.1.6, 6.1.7, 6.1.9, 6.1.9.1, 6.1.9.2, 6.2, 6.2.3, 6.2.4, 6.2.4.1, 6.2.6, 6.2, 6.3.1, 6.3.1.1, 6.3.3, 6.3.5, 6.3.5.1, 6.3.5.2, 6.3.6, 6.3.6.1, 6.3.7

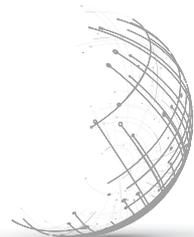
See also: Learning Goals and Objectives

Student Selection 4.3.2, 4.3.3, 4.4, 4.4.1, 4.4.2, 4.4.3, 4.4.4, 5.1.1, 5.1.2, 5.1.4, 6.1, 6.1.3, 6.1.3.1, 6.1.13, 6.1.13.1, 6.1.13.2

Sustainability: 4.3.7, 6.1.4, 6.1.9.1, 6.2.3, 6.2.5, 6.2.5.1, 6.3.6.1

Transparency 4.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.2.4, 5.1.1, 6.1, 6.1.8, 6.1.10, 6.1.11, 6.1.12, 6.1.13, 6.1.13.1

Well-Being: *see Health, Safety, and Well-Being*





ISBN: 978-1-952376-04-7