DEVELOPING AND MANAGING STUDY ABROAD PROGRAMS

A Handbook for Post-Secondary Institutions

December 2001

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ACKNOWLEDGEMENTS

The information in this handbook was developed with the co-operation of many international practitioners from across Canada. Special thanks are extended to colleagues for their guidance, support and encouragement, and to those who provided copies of their materials for the handbook.

In particular, the following people from the University of British Columbia, were very helpful during the preparation of this module: Richard Spencer, former Registrar and Director, Student Services; Winnie Cheung, Director, International Student Services; Sital Mahal, Program Administrator, Student Exchange Program Office; John Hamilton, work-study student (1992-94), Student Exchange Program Office; Mary Watt, Co-ordinator (1994-95), Student Exchange Program Office; Thevi Pather, Co-ordination, Student Exchange Programs and Associate Director (1995-99), International Student Services; Bob Frampton, Housing; and Pat Shanahan, Susan Rey-Bosch, Daniel Gardiner, Ethel Davis, and Shirley Irvine, academic program officers, Faculty of Commerce and Business Administration. Thanks also to Randall Martin, Simon Fraser University; Barry Tonge, University of Alberta; and Wayne Miles, Queens University.
## Table of Contents

Acknowledgements...........................................................................................................3

Table of Contents...........................................................................................................5

Forward..............................................................................................................................7

**SECTION 1 – INTRODUCTION TO DEVELOPING AND MANAGING STUDY ABROAD PROGRAMS** ...........................................................................................................9

  - The Rationale for Study Abroad Programs.................................................................10
  - The Program Models for Study Abroad.................................................................12
  - Where to Begin........................................................................................................15
  - Establishing the Infrastructure.............................................................................18

**SECTION 2 – ESTABLISHING AND MANAGING STUDENT EXCHANGE PROGRAMS** ...........................................................................................................23

  - The Elements of an Exchange Program.................................................................24
  - Exchange Program Policies..................................................................................27
  - Registrarial Issues................................................................................................30
  - Policies and Procedures: Outgoing Students.....................................................32
  - Policies and Procedures: Incoming Students.....................................................34

**SECTION 3 – ESTABLISHING AND MANAGING FIELD SCHOOL PROGRAMS** .......................................................................................................................37

  - The Elements of a Field School Program.............................................................38
  - Development of a Field School Proposal............................................................39
  - Implementing the Field School............................................................................41

**SECTION 4 – COMMUNICATIONS FOR STUDY ABROAD PROGRAMS PROMOTION, ADVISING AND ORIENTATION** ........................................................................45

  - Promotion..............................................................................................................46
  - Advising..................................................................................................................51
  - Orientation.............................................................................................................53
FORWARD

Developing and Managing Study Abroad Programs has been developed as part of the Professional Development International Education Project of the British Columbia Centre for International Education (BCCIE). Established in 1990, BCCIE has been active in facilitating the internationalization of British Columbia's public post-secondary institutions. One of its key goals is the development of the international education experience and expertise among faculty, administrators, staff and students. Along with the province's colleges, university-colleges, universities and institutes, BCCIE is taking a leading role in international education in Canada.

International students have been enrolling in BC institutions and BC students have been going abroad for many years. In fact, the Registrars' Offices of a number of institutions have long had personnel devoted to looking after the needs of international students coming into their institutions. However, the advice and help that students need when they are thinking about going abroad are not always centrally available or is often left to sponsoring departments or agencies.

Developing and Managing Study Abroad Programs is designed to help post-secondary institutions establish and co-ordinate these programs. The administrators that the handbook addresses may be fully engaged with study abroad or it may be only one part of their responsibilities. The handbook outlines the various considerations leading to the establishment of study abroad programs on campuses and provides general guidelines for start up. It consists of five sections: Introduction to Developing and Managing Study Abroad Programs, Establishing and Managing Student Exchange Programs, Establishing and Managing Field School Programs, Communications for Study Abroad Programs and Resources. While the sections have been written primarily for administrators new to these programs, it is hoped that the information may also benefit those looking for suggestions and ideas for improving existing programs.

Up-to-date resources for this manual can be found at www.bccie.bc.ca/domesticstudents.
SECTION 1

INTRODUCTION TO DEVELOPING AND MANAGING STUDY ABROAD PROGRAMS

Purpose
Study abroad programs are enriching both for the visiting students and for the host campus. However, arranging for students to go abroad poses human and logistical problems. The Introduction to Developing and Managing Study Abroad Programs provides an overview of the kinds of programs an institution might consider when discussing study abroad programs and a checklist of the basic structures needed to support these. While this section does not address how to find study abroad partners, following these general guidelines and suggestions will help to ensure that a campus is ready to send students and to ensure that their needs can be met on an ongoing basis.

Objectives
By the end of the Section 1, you will be able to:
• provide a rationale for study abroad programs
• describe different program models
• understand the guidelines for deciding the models best suited for a campus
• understand the risks and responsibilities
• determine what institutional support is necessary for the success of a program
• establish an international program office
• organize a resource centre.
THE RATIONALE FOR STUDY ABROAD PROGRAMS

Objectives
At the end of this section, you will be able to:
• understand the importance of study abroad programs in today's world
• list the four key benefits of having a study abroad program.

Why introduce study abroad programs?
Today's world is indeed global. We participate in a global economy and communicate around the world through instantaneous media. Because they recognize the importance of international understanding, more and more post-secondary institutions are providing their students with a variety of international educational opportunities and exposure to students in other countries and cultures.

There are four key benefits to the institution in building and maintaining a reputation of involvement with study abroad programs:

• Study abroad programs provide depth and diversity to on-campus academic programs.
• Institutions with strong study abroad programs attract students who are interested in preparing for international employment or local employment in businesses with international links; these are desirable students, high achievers and highly motivated.
• Once an institution’s reputation is known for training students with international experience or exposure, recruiters will be eager to hire them. Success in job placement makes the institution more attractive to incoming students.
• Word of mouth is an effective and efficient means to market an institution internationally. Sending your students abroad helps to build institutional awareness worldwide. Meanwhile, providing incoming international students with a worthwhile educational experience at a Canadian Campus will produce lifelong ambassadors for your institution.

International learning outcomes and employability skills
One of the most powerful and meaningful ways of acquiring and integrating knowledge and skills is through direct personal experience. Study, work and travel abroad are life changing experiences, providing a new awareness of self, values, attitudes and world views. BCCIE’s report, Preparing Graduates for the Future: International Learning Outcomes (Stanley & Mason, 1997), provides faculty with a framework for developing internationally focused programs and gives students a language and structure to reflect on their experience abroad. The international learning outcomes identified in the report are outlined in the following table:
## International Learning Outcomes and Employability Skills

<table>
<thead>
<tr>
<th>Theme</th>
<th>International Learning Outcomes</th>
<th>Employability Skills Enhanced</th>
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<tbody>
<tr>
<td>Appropriate registers in the use of English</td>
<td>• Adapt use of English to the formality of the situation and the fluency of the business partner in international business and social settings</td>
<td>Understand and speak/write the languages in which business is conducted</td>
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<tr>
<td>International business etiquette</td>
<td>• Demonstrate appropriate international etiquette in situations with business colleagues and clients such as greeting, introducing, thanking, taking leave, negotiating and confirming contracts, socializing, paying and receiving compliments, and gift-giving</td>
<td>Understand and speak/write the languages in which business is conducted</td>
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<td>Language skills</td>
<td>• Speak an additional language(s), preferably one spoken by peoples of the Pacific Rim, proficiently enough to understand and be understood in everyday conversation. Understand a newspaper, technical reports and everyday instructions (e.g. using a telephone)</td>
<td>Identify, analyze and solve problems                                                                                         Find new ways to solve problems</td>
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<tr>
<td>Canadian and global perspectives</td>
<td>• Demonstrate knowledge of world geography</td>
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<td></td>
<td>• Integrate knowledge of Asian, Central and South American, Soviet, Russian and African history</td>
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<td>• Demonstrate a knowledge of Canadian history, political structure, geography, current events and accomplishments</td>
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<td>• Reflect on, and compare, a variety of perspectives on world historical events</td>
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<td>• Demonstrate a knowledge of the world's great religions and their impact on social, cultural, and political realities in society</td>
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<td>• Assess own knowledge and skills to think about, and act on, global concerns</td>
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<td>• Analyze global issues from multiple perspectives</td>
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<td>• Understand the interconnections between local and global issues</td>
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<td>• Understand the impact of historical events, culture, political structures, and geography on world events</td>
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<td>• Understand the impact of Western liberal democratic views on one's perceptions of the world</td>
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<td>• Analyze critically the sources of information on world events</td>
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<td>• Demonstrate a knowledge of global issues such as poverty, population growth and global warming</td>
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<td>• Demonstrate a personal commitment to social justice, equity and environmental stewardship on an environmental level</td>
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<td></td>
<td>• Understand the history of Canada's international relations and experience as well as our country's current policies and international relations</td>
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<td>Intercultural competence</td>
<td>• Demonstrate the qualities of tolerance, sensitivity to others and tact</td>
<td>Demonstrate a positive attitude toward change</td>
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<td></td>
<td>• Demonstrate open-mindedness and curiosity with respect to other countries and cultures</td>
<td>Recognize and respect people's diversity and individual differences</td>
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<td>• Demonstrate pride in Canadian culture and accomplishments</td>
<td>Demonstrate flexibility and adaptability</td>
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<td>• Demonstrate flexibility while retaining the stability of one's own identity and values</td>
<td>Use appropriate body language</td>
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<td>• Recognize and respect individual and cultural differences</td>
<td>Work effectively with co-workers and in teams</td>
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<td></td>
<td>• Recognize issues that may be sensitive to other cultures and peoples and respect their beliefs</td>
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<td>• Identify one's own biases and attitudes</td>
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<td>• Subjugate the need to impose one's own structure and ideas on others</td>
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<td>• Demonstrate willingness to adapt to others' standards of behavior: political, cultural, social, religious</td>
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<td>• Practice good listening skills (learn to speak less, listen more)</td>
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<td>• Demonstrate an ability to problem-solve issues related to one's professional competence in different cultural contexts</td>
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<td>• Understand the differences in respect for persons, adult-child relationships, gender relationships in other cultures</td>
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<td>• Understand the impact one's own values and beliefs have on one's perception of world events</td>
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<td>• Understand the day to day realities, political environment, and current events of other cultures and peoples</td>
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<td>• Understand how culture and politics influence the business practices and business ethics of other societies</td>
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<td>• Be willing to and know how to find information on another society</td>
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<td>• Examine own assumptions about other cultures</td>
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<td>• Take initiative to facilitate social interaction</td>
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<td>Resiliency and coping skills</td>
<td>• Demonstrate integrity within one's own culture</td>
<td>Manage workload and personal stress</td>
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<td>• Manage own stress levels and practice good self care</td>
<td>Demonstrate leadership skills</td>
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<td>• Demonstrate leadership skills in diverse situations</td>
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<td>• Demonstrate methods for handling challenging situations under difficult circumstances</td>
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<td>• Demonstrate psychological preparedness for the situations you might encounter in another setting</td>
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<td>• Identify and respond to one's own stage of adaptation and culture shock</td>
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THE PROGRAM MODELS FOR STUDY ABROAD

Objective
At the end of this section, you will be able to identify the attributes of the various program models for study abroad.

ASSESSING PROGRAMS
It is important to understand the different types of programs when setting up study abroad programs. There is no single format or curriculum that is better than another, only ones that provide a better "fit" for the institution. Consider the following questions in making decisions about programs:

- What types of experiences—study, work, volunteer—best suits your students?
- What country or geographical area complements your academic programs?
- What would be the best length of program—short study, summer session, one or two terms?
- How much cultural contact is appropriate for your students—do they want total cultural immersion or would they be better off housed and working with a group of Canadian students?
- What levels of cost are appropriate?

COURSES OF STUDY
It is important to build upon the strengths of your institution's current involvement in international exchanges and international projects, and to understand their aims. Many study abroad programs begin as extensions of disciplines or specializations: the study of rock formations in Peru as part of a geology degree, working with a South African city planner in conjunction with an urban studies program. Some institutions choose to focus on a country or a region, with exchanges involving the language, literature, religion and culture of the area. Others permit students to gain credit through service-learning—community service—in other countries. Still others encourage students to explore a diversity of opportunities worldwide.

Exchange programs
In an exchange program, selected students from your institution elect to go abroad to study at a partner institution, while their students come to your institution. Normally, the visiting student attends classes with students in the host country. They are not usually registered in a degree or certificate program and are subsequently not required to complete the traditional admissions process. Tuition is paid to the student's home campus and credits are granted by it.

Normally exchanges involve senior-level students who have declared some specialization of study. They are more likely to have a stronger rationale for participating in an exchange program than students new to the program and subsequently less academically focused.

Exchange programs are often referred to as "integrated" or "direct enrolment" programs because students are integrated into the regular academic programs at the host campus.
These are normally programs based on bilateral institutional relationships and the terms and conditions of the relationship may vary somewhat from one institution to another.

See Section 2, Establishing and Managing Student Exchange Programs, for more information.

**Field school programs**

Students in field school programs are involved in specific projects outside the classroom, for varying lengths of time. Faculty members from the home campus normally supervise them but field schools may involve students, faculty, and community members from the host country to help with cultural adaptation and provide hospitality. The projects may be academic, like language learning or an archeological dig, but they are often experiential, designed to acquaint students with another culture while they address such problems as water purification and agricultural practices; or these programs can be community-based practicums closer to home.

Field school programs offer learning experiences in a less formal atmosphere than those of a classroom. They may attract students who welcome the comfort of travelling and studying with a group.

Field school programs may be ongoing from one year to the next or arranged on an ad-hoc basis. The cost of these programs is determined by the location of the field school and its duration. There is generally a fixed program fee for a field school that covers the costs of administration, instruction, materials, accommodation, travel, etc. Credit is granted by the home institution.

See Section 3, Establishing and Managing Field School Programs, for more information.

**Branch campus programs**

Branch campuses are established by the home institution to enable their students to study internationally. These involve long-term commitments, as they require extensive advance preparations and capital outlay. The home institution sets the curriculum, which is taught by faculty who are recruited from the home campus, or by local faculty who meet the sponsoring institution's standards. Credit is granted by the home institution and tuition paid to it. Students bear the travel and accommodation costs.

Branch campus programs allow for larger groups of students than exchanges or field schools. They are generally very structured programs and are attractive to less independent or self-confident students. After the initial costs of setting up the branch campus, there are savings in administration costs, orientation programs and advising.

Enrolment may be restricted to students from the home institution, in which case the program is considered an "island program," or local students may be encouraged to enrol to provide increased cultural exposure.
**Hybrid or mixed programs**

Some institutions have developed programs combining the cultural advantages of exchange programs with the strengths, control and convenience of branch campuses. Visiting students are provided with more on-campus support than in traditional exchange programs. They may be given specialized programs, for example, in language and culture, before integration into classes with host students or they may participate in sequestered tutorials annexed to regular classroom courses. A host institution may establish an "exchange student stream" for visiting students. The cost of these enhancements is added into the program fee and paid for by the student or the home institution.

**Independent study programs**

Many institutions grant credit to independent study initiated by students. The interested student normally develops an individualized study plan, in conjunction with a faculty supervisor, which is then approved according to procedures developed by the home institution.

Successful candidates demonstrate maturity, discipline, a solid background in the chosen area of research, language proficiency, the ability to organize well, and cross-cultural skills and stamina.

Credit is determined and granted by the home institution. Tuition is normally paid to the host institution and additional costs are borne by the student (i.e. travel, accommodation). The administration costs to the home institution are negligible. Faculty supervisors take on their responsibilities as they would with on-campus independent study courses.

**Partnerships and consortia**

Partnerships and consortia involve two or more institutions in the operation and control of long-term programs. They allow institutions to pool resources, students, faculty and administrative costs while each retains some control over program design and educational standards. The terms and conditions are subject to formal agreements and are established before the programs accept students. They normally involve credit transfer.

Participating institutions pay an annual management fee to cover co-ordination costs, while students normally pay tuition to the home institution and bear the costs of travel and accommodation.

Examples of federally supported consortia arrangements are through the International Mobility in Higher Education Programs (IMHE). Under IMHE are the North American Mobility Program which includes Canada, US, and Mexico and the EU-Canada Program which is between Canada and European Union member countries.

The requirements of these programs vary slightly, but essentially require institutions to develop a consortia of institutions from the region to support student mobility between consortia members in a particular discipline.
WHERE TO BEGIN

Objectives
At the end of this section, you will be able to:
• assess how a study abroad program will enhance the mission of the institution
• assess the impact of a study abroad program on existing programs and policies
• identify the campus contacts essential to ensuring the effective implementation of a study abroad program.

Connecting with the campus community
Making sure that the campus community supports your objectives in establishing a study abroad program is a vital first step. A good study abroad program, thoughtfully developed, enhances the social and educational goals of the institution's programs in order to be accepted. To this end, it is useful to spend some time assessing the institution's mission statement or general policies. If an institution desires a study abroad program that is principally academically oriented, then perhaps exchange programs lasting an academic term or year would be most appropriate. If the study abroad program is primarily for students engaged in career training, then an emphasis on work experience may be more appropriate.

Ensure that you have background facts and figures at your fingertips. It is important to know which nearby campuses have formalized study abroad programs and how many students are involved. It may be useful to interview, by phone or in person, a knowledgeable person in the study abroad program office at another institution about their experience, especially in the start-up phase. You may also be able to discover whether some countries are more open to study abroad programs than others. BCCIE collects BC wide information on the type of exchange and linkage arrangements established by BC institutions and can put you in contact with personnel at institutions with experience in the region you are considering.

Most study abroad programs develop from various interested faculty members with specific academic or geographical expertise, or long-established partnerships with international institutions. Find out what informal study abroad is currently being undertaken on your campus and by whom. The Registrar can often tell you which departments have students who apply for international transfer credits.

It is important to begin with specific departments for informal meetings to discuss study abroad program opportunities. These can be organized by region (Asia, South America, etc.) or by language (Spanish, German) or by discipline (geography, literature). At these meetings individuals may wish to consider the following questions:
• Are there any current international agreements?
• What is the level of interest among students for study abroad?
• Is there faculty support?
• Are there other programs that might compete for student demand, such as existing work-study programs?
• What program model is most appropriate (exchange, field school, branch campus, etc.)?

The office or individual who serves as a liaison for incoming international students is an important resource and ally in establishing study abroad programs. This liaison should be kept informed throughout the planning process and involved whenever appropriate.

**Developing your program**

Once you have identified the one or two key areas of support for study abroad on your campus, you can begin planning your program in conjunction with faculty members and the department’s administrative staff. Remember, it is best to start small and focus on the essential elements. Once a pilot program is established as efficient and effective, it will become the basis for reflective assessment and growth.

Bear in mind:

- the type of program
- the type of experience—study, work or volunteer
- the duration of the study abroad component
- costs—how much and who pays them.

It is important to appreciate that no perfect program exists for every student. Through continuing consultation, you can, however, ensure that the majority of interested students will be accommodated.

**Assessing the resources**

Once you have decided on a potential program model, you might ask yourself these questions:

- What additional administrative resources are necessary for successful implementation?
- Where will start-up funding come from?
- Where will the program be housed for administrative purposes?

**Policy and administrative issues**

Along with assessing the human, financial and infrastructural factors essential to establishing a program, it is important to know what existing policies and administrative structures at your institution need to be modified to accommodate study abroad. Examine admissions and registrarial policies that relate to application deadlines, registration processes and language or other entrance requirements to see if they are impediments to incoming students. Review departmental regulations governing prerequisites in light of a proposed study abroad program. Most policy changes take time to implement and it is important to understand and communicate necessary steps to be followed to ensure the cooperation of everyone involved.
Internal resources
The following is a list of people on campus who should be consulted during the planning process:
- President
- Vice-Presidents: Academic, Planning, Finance, Student Affairs/Student Services
- Deans
- Relevant department heads and directors of programs
- Academic advisors
- Admissions
- Registrar
- Records and registration staff
- Financial aid staff
- Housing staff
- Career planning staff
- Relevant student organizations
- Campus legal team.

External resources
The following may be useful during program planning and development
- British Columbia Centre for International Education (BCCIE)
- Canadian Bureau of International Education (CBIE)
- Association of International Education Administrators (AIEA)
- Association of Universities and Colleges of Canada (AUCC)
- Association of Canadian Community Colleges (ACCC)
- Council of Ministers of Education (CMEC)
- Consulates and embassies of Canada and foreign countries
- NAFSA: Association of International Educators.

Risks and responsibilities
"Duty of care" refers to the duty that your institution has to your students for their health and safety and their academic well being during the programs that you organize or help to organize.

Keep in mind that institutions involved in study abroad programs continue to have a "duty of care" to students participating in these programs. The fact that the students are duly registered at your institution and you are involved in their selection, orientation, placement and debriefing establishes a relationship between them and your institution. The more the institution is involved with managing the program, the greater is the responsibility to the students in it.

There are two sorts of issues arising from "duty of care": preserving the health and safety of students and limiting institutional liability.
All students in study abroad programs should have:
• pre-departure advising and orientation
• health and safety information
• briefings on emergency protocols, including evacuation plans.

The institution should have:
• crisis management protocols
• adequate third-party insurance
• evacuation plans for group programs
• confirmation of adequate health insurance
• a signed contract or waiver of liability indicating that the student is participating in the program with informed consent.

Encourage your institution to review its policies to include study abroad activities and that they have the support services required to meet the participants’ health and safety needs while abroad and for visiting students on your campus.

ESTABLISHING THE INFRASTRUCTURE

Objectives
At the end of this section, you will be able to:
• identify the essential study abroad support offices and committees
• identify the role and scope of the international program office
• establish a resource centre.

Study abroad advisory committee
It is important to maintain and strengthen the connections with faculty and administration made during the planning phase. The most successful study abroad programs are fully integrated with other campus programs and contribute to the internationalization process of the institution. Their permanence can be jeopardized if they are perceived as too separate and independent of the goals of the institution.

It is valuable to establish an advisory committee to provide direction for the programs. Its mandate might be to:
• set institutional goals and objectives
• develop policies and procedures
• establish selection criteria for students in the program
• review and evaluate programs.

It is helpful if members of the committee represent diverse areas of the institution. While it is necessary to have broad representation, it is equally important that the members have some relation to and interest in the program.
In addition to staff hired or appointed to the co-ordinating office for study abroad programs, members might be:

- senior administration, such as the Dean (or Associate Dean) of Students
- staff from the Registrar's Office
- the liaison for incoming international students
- faculty members from faculties and/or departments involved with the programs
- academic advisors from faculties and/or departments involved with the programs
- students from faculties and/or departments involved with the programs
- representatives from international student associations.

**Study abroad office**

In order to gain acceptance for the study abroad program across the institution, visibility is critical. One of the best ways to achieve visibility is through the establishment of a central office to promote these programs. Having one office rather than a program where different responsibilities are handled across campus will facilitate the ability to plan, develop and advocate for the program. Key functions of the office include the:

- provision of information on programs
- co-ordination of activities
- development and implementation of policies
- negotiation of exchange agreements
- identification and arrangement for support services.

Even if there is a division of responsibility for study abroad programs among offices on your campus, it is vital that they establish effective communications through a single position. Study abroad co-ordinators are normally the initial point of contact for the promotion of and information about the programs.

**Location of the study abroad office**

Most of these offices are affiliated within offices in academic units or student services. However, they are sometimes independent units within institutions.

**ACADEMIC LOCATIONS**

Study abroad offices are sometimes affiliated with a particular faculty as an extension of the Office of the Dean or, more rarely, as part of a department, such as Romance Languages. The more closely related the study abroad program is with an academic unit, the more acceptance it is likely to have. On the other hand, closer affiliations with departments usually mean faculty may have to have a greater say in determining the policies of the program.

**ALLIANCES WITH STUDENT SERVICE OFFICES**

If the study abroad office is connected with student services, as part of career counselling or an international centre or, more rarely, the admissions office, the administrative needs of students in the program may be more easily met. However, attention will have to be paid to obtaining academic counselling and acceptance of academic transfer credit in co-operation with faculties or departments.
INDEPENDENT UNITS
Some institutions have offices in place to address the needs of their incoming international students, which may, in addition, take on study abroad program responsibilities. This location ensures staff familiar with the issues and problems connected with international programs.

Staffing the office
Trained professional staff are important for the success of the study abroad program. Smaller institutions, or those just starting programs, may designate a single individual within an academic unit or student services to be responsible for overseeing the initial development and implementation. As the program grows, one or more dedicated staff members will likely be required.

Look for program staff who are:
• committed to the concept of international education and study abroad
• skilled at intercultural communication
• knowledgeable about current affairs.

They will be responsible for ensuring that the office continues to liaise with other areas of the institution and that its activities reflect the institution's mission, policies and procedures. They will also liaise, as appropriate, with external representatives, such as:
• civic leaders and officials
• media representatives
• community service organizations
• embassies and consulates
• international institutional partners.

The resource centre
A resource centre, whether simply a bookshelf in an office or a dedicated room, is a valuable asset to the study abroad program. A well-organized centre is the source for information about the programs for both students and faculty, containing information about specific study, work, volunteer and education abroad programs, general programs, country and region information, maps, and visa information.

Depending on how the study abroad programs are developed, the centre's materials could be organized either by program—work, study or volunteer—or by country and region. General reference books, resource guides and information on educational travel can also be included, as well as institutional calendars specific to the programs available.

See Section 5 for more information on resources and visit the BCCIE website at www.bccie.bc.ca/domesticstudents.

The resource centre is best located in or near the study abroad office.
A well-stocked resource centre includes:

- Program-related material. This is information specific to the programs sponsored by the institution, such as calendars, course information, housing information, approximate costs and tourist information.
- Information sheets summarizing the opportunities and requirements for each program, including eligibility requirements, credit transfer, name(s) of academic advisors, and the application and selection process.
- Financial aid and scholarship information to inform students of programs like the BCCIE Asia Pacific Awards and International Grants.
- Student reports and questionnaires. Among the most valuable resources for prospective exchange students are the personal reports and questionnaires completed by former students studying abroad. They can help prospective students by supplying information that is not always available in the host institution's materials or your program information.

With the growth of information available through the internet, staff of the resource centre will have to maintain an up-to-date list of relevant web sites. Since new sites come on line daily and old ones disappear, it will take close monitoring to ensure that an accurate list is always available. A key resource for your purposes is the BCCIE web site www.bccie.bc.ca/domesticstudents.

Additional sources of information include:

- promotional videos
- travel guides
- microfiche library: calendars for hundreds of universities worldwide are available on microfiche
- relevant magazines and newspaper clippings.

You may want to ensure that your institution is on mailing lists for the information offices of the countries with which you have linkages. It is useful to managing the resource centre and developing a tracking system for material taken out on loan.
SECTION 2

ESTABLISHING AND MANAGING STUDENT EXCHANGE PROGRAMS

Purpose
Establishing and Managing a Student Exchange Program is designed to help you understand the elements of student exchange programs, including the characteristics, policies and the preparation processes that precede actual exchanges.

Generic forms are included in Appendices A, B and C. Institutions may choose to use these and adapt them to their particular needs and as the program develops.

Objectives
By the end of Section 2, you will be able to:
- identify the elements of exchange programs and understand the selection process of partner institutions in order to negotiate exchange partner agreements
- recognize the institutional policies and politics that affect exchange programs
- understand the registrarial issues involved in exchanges
- identify the procedures required for facilitating outgoing exchange students
- identify the policies and procedures to deal with incoming students under the exchange agreement.
THE ELEMENTS OF AN EXCHANGE PROGRAM

Objectives
At the end of this section, you will be able to:
• identify the strengths and weaknesses of exchange programs
• conduct due diligence and risk assessment of potential programs
• understand the critical elements of an exchange agreement.

What is an exchange program?
Institutions from different countries, through formal agreement, agree to allow students from one institution to study at the other. Usually students receive academic credit for their study. The exchange is usually for a set period, a term or an academic year. The students are integrated into the regular programs of the host campus. These are sometimes referred to as "integrated" or "direct enrolment" programs as opposed to the branch campus model, outlined in Section 1.

Advantages and disadvantages of exchange programs
The main educational benefit of an exchange program is that students have the opportunity to learn about another culture first hand at a reasonable cost. They enjoy all the privileges of studying at a foreign institution, including access to its services and facilities generally for the additional price of travel and the cost of living while paying tuition at their home institution. While some arrangements may involve visiting student's paying tuition to the host institution directly, it is normally at the domestic student rate, rather than a higher foreign student fee.

International exposure is a valuable asset in supplementing students' preparation for employment. Increasingly, companies are involved in a global market and people who have experience outside their home country bring another perspective that is useful to their employers.

Participating campuses also benefit through the enrichment that exchange students bring to their classes and campus activities. The institutions gain international exposure, and sending students abroad helps to build institutional awareness world-wide. Meanwhile, providing international students with a worthwhile educational experience at a Canadian campus through reciprocal arrangements will produce lifelong ambassadors for your institution.

The major drawback to student exchange programs is that they cost money and time without direct revenue generation. While the direct outlay is usually fairly modest, a considerable amount of time must be spent to ensure that the student selection process is carried out fairly and in a timely fashion, that the students who are chosen receive adequate counselling, and that academic transfer credit is handled properly. A resource centre housing information about the programs is necessary and information needs to be continually updated. The program requires faculty and administrators willing to spend time individually and in committees to ensure smooth operations.
Selecting the right exchange partner

Think about why you are developing exchange programs. It is useful if the organizing or advisory committee at the home institution specifies as precisely as possible criteria for selecting a partner. These may include:

- the geographical region most directly related to the interests of the likely participants
- the availability of suitable programs
- institutional willingness and ability to facilitate the program
- similarity of approach between the home and host institutions
- experience with similar outreach programs
- academic complementarity.

Key components of effective exchange

After extensive research and consultation with key representatives from the Asia Pacific Region, BCCIE determined that the following are some of the key components required for a successful sustainable program:

- strong partnerships
- long-term commitment
- achievable goals and objectives
- commitment to internationalization
- student internships
- reciprocal student mobility (in student numbers and tuition fees)
- faculty mobility
- staff mobility
- creation of institutional networks
- joint programming
- international exchange of credit
- flexible and variable contribution options for funding.

Due diligence and risk assessment

Performing due diligence and risk assessment will help institutions spot potential problems so they may be weighed against the benefits. Questions about the partner might include:

- whether the mode of instruction at the visiting institution is compatible with the expectations of students from your campus
- the relative cost of living of the two countries—if the disparity is too great, visiting students may find the other prohibitively expensive
- the living arrangements available to visiting students
- a sound understanding of the regulations applicable, such as visa requirements and travel restrictions
- an assessment of the political situation of the partner's country and the potential for threats to the safety and security of the visiting students.

Finding answers to these questions will involve some research on your part and may require at least one visit to the potential partner institution. Try to obtain extensive information about the academic programs from potential exchange partners. To see if there is a fit, it is
helpful to get assessments of these programs from relevant academic departments at your institution during the preliminary negotiation stages. If the home academic departments are reluctant to grant credit for a potential partner's courses, you may wish to reconsider the exchange.

Find out whether the potential partner has exchange programs already in place with other institutions and if they are interested in expanding or diversifying their programs. Contacting them for information and advice will save a significant amount of time.

The Canadian government is a useful resource for information on comparative costs of living, visa requirements and travel restrictions. The web site is http://www.voyage.gc.ca/consular_home-e.htm. Also consult http://www.e-thologies.com for additional country specific information.

Consider these questions about the program's impact on the home campus.
- Is the proposed exchange compatible with existing programs or similar ones?
- Is there, or will there be, sufficient student demand?
- Is the institution committed to the exchange and willing to support it with adequate resources?
- Is the relationship with the potential partner one that complements the values and vision of the home campus?
- Is there a process in place to utilize the experiences of students to support the institution’s instructional learning framework on their return?

Your advisory committee can provide a helpful forum for determining the answers to these questions. To make the committee's discussions fruitful, provide the members with clear and well-organized information about the proposed program or programs well in advance of the meetings.

**Exchange partner agreements**

The agreement between exchange partners should be as complete as possible without imposing undue restrictions. Appendix A provides a useful template. Here are some of the key elements of an exchange agreement.

**ADMISSIONS REQUIREMENTS**

It is important to clarify the admissions expectations in broad terms in the agreement. Normally, the exchange students are selected by their home institution for participation in the program and the host institution agrees to abide by the results of this selection process. This eliminates or reduces a formal “acceptance process”. In some cases, the host institution reserves the right to make the final acceptance decision.

It is normal practice to request that any selected candidates meet a minimum grade point average (GPA), as determined either through the agreement or by their home institution. The level of language proficiency should be spelled out, although the Test of English as a Foreign Language (TOEFL) score for formal admission to a degree program may be waived for visiting exchange students.
The agreement should specify the extent to which a balance in numbers of students exchanged (reciprocity) is essential. It may be agreed to achieve balance on an annual basis or over a longer term, i.e. equal numbers over three years.

**PARTICIPANTS**
Exchanges usually involve students who have studied at least one year at their home institution and have declared some specialization of study. The agreement may specify what level of student is mutually acceptable, i.e. third year students.

The agreement may specify that students are registered on a course-by-course basis at the host institution without being formally admitted. They are generally expected to carry a full academic load and they are subject to the same academic regulations and class performance as the other students in the host institution.

Most agreements have a repatriation clause in the event that students do not live up to the agreed-upon expectations.

Students are awarded academic credit by their home campus, which determines the eligibility of these credits. However, some campuses establish exchange programs that result in no academic credit; students participate for the benefit of the foreign experience.

**TRANSPORTATION AND ACCOMMODATION**
Participants are usually responsible for their own travel and visa arrangements to and from the host country. The host institutions may assist in securing accommodation either in homestays or student residences.

**DURATION OF THE AGREEMENT**
The standard term of an agreement is normally three to five years with an option to renew.

**EXCHANGE PROGRAM POLICIES**

**Objectives**
At the end of this section, you will be able to:
- identify the policies which facilitate an exchange program
- understand who should be involved in establishing new policies or amending existing ones
- identify which campus offices are critical to ensuring the ongoing success of exchange programs.

The work of the advisory committee on exchange programs does not end with the signing of an agreement. Successful implementation requires ongoing review by administrators and faculty members. Students can usefully contribute to discussions as well. Harmonizing practices with a foreign institution always poses difficulties and a standing committee familiar with the arrangements and past practices can respond quickly and fairly to problems as they arise.
It helps to carry out program evaluations at regular intervals to ensure that the program continues to support the institution's goals. See Appendices D and F for some models.

**Academic policies**

Academic transfer credit is central to establishing an exchange program. Since a one-to-one correspondence between courses in the partnering institutions is unlikely (and probably undesirable), policies for determining whether and which courses will receive academic credit towards a degree, diploma or certificate have to be put in place before students leave on exchange.

Obtain as much information as possible about the courses at the partnering institution and have them reviewed by the appropriate academic departments at your institution. This procedure will help you to determine if there are particular problem areas that need to be addressed, such as the prerequisite structure and the year level of courses likely to be subject to transfer credit.

Policies governing the courses open to incoming international students can be negotiated at this time. Clear and continuing communications among institutions and departments within institutions at the outset will go a long way toward producing programs that run smoothly.

Ensure that the policies receive approval from appropriate bodies and be prepared to spend some time, perhaps a year or more, shepherding new policies through the administrative channels.

**Eligibility and selection policies**

An exchange program is an academic program like any other. Your institution will need to establish eligibility and selection requirements in keeping with the established procedures. There are, however, issues unique to exchange programs that also need to be addressed.

**Citizenship**

You need to decide whether your applicants must be Canadian citizens or landed immigrants. It can be argued that visa students attending your institution already benefit from the experience of another culture. On the other hand, it might be viewed as discriminatory to restrict their access to exchange programs. Some institutions have a regulation stating that visa students are eligible for exchanges but may not apply for exchange programs in their home country or culture. This ensures that they obtain a different international experience.

**Post-secondary experience**

Most institutions require students to have completed a minimum number of credits at the home campus prior to becoming eligible to apply for an exchange program. They must have demonstrated the ability to perform academically at a post-secondary level and acquired the maturity and sense of responsibility to study internationally.
ACADEMIC PERFORMANCE
To be selected for an exchange program is an honour and it is frequently viewed as a reward for academic achievement. It takes academically capable students to cope with the challenges of studying in a new and very different academic environment. It is common to require a minimum grade point average (GPA) for application while making it clear that a higher one will be given additional weight in the selection process.

FULL-TIME STATUS
A number of institutions require that students applying for exchange programs be fully enrolled at the time of application. It is argued that this demonstrates the academic commitment necessary to gain the maximum benefit from the program.

ACADEMIC FOCUS
It is often considered desirable for applicants to have stated or declared a major subject, and to have been accepted to a department, discipline or specialization. This demonstrates academic commitment and a rationale for selecting a particular exchange institution.

RETURN TO THE HOME CAMPUS
It is normal practice for students to complete their degree/program requirements after returning from their exchange experience. The exchange term or year is rarely the last before receiving a certificate, diploma or degree. By sending students in their last term or year, with no academic requirements remaining at their home institution, you lose the valuable contribution and experience that the “returning” students add to the classroom.

Other related policies

FACULTY EXCHANGES
You may want to establish policies for faculty exchanges at this time. Except as a clearinghouse for information and application, it is unlikely that the study abroad office would have much involvement in the actual selection process for faculty exchanges.

FINANCIAL AID
Determine what financial assistance will be available to students going on an exchange. Since it is normal for exchange students to pay tuition to their home institution, you may want to suggest a policy that makes them eligible for financial aid on the same footing with resident students. There may be some burden of proof that the academic program sought by a participant in the exchange program is not available in the home country to be eligible for funding.

However, international study usually entails more expenses than remaining at the home campus. It is useful to work with the Financial Aid Office to make special arrangements for applying for loan, bursary and scholarship applications for students who could not otherwise afford the experience.
REGISTRARIAL ISSUES

Objectives
At the end of this section, you will be able to address the following registrarial issues:
• registration
• course load requirements
• tuition and fees
• transfer of credit and grades
• registration for returning students
• registration issues for incoming students.

Registration
Students involved in exchange programs register with their home campus and usually receive credit for the courses they take as part of the requirements for a certificate, diploma or degree. However, exchange programs frequently involve matching programs with very different structures which means that it is unlikely that your institution will have courses equivalent in subject matter, weight, level, and duration to those undertaken by the exchange students. Arrangements must be made ahead of time to accommodate these differences. As well, the exchange student's registration may have to be completed outside the normal registration period and arrangements will have to be put in place to ensure exchange students get adequate selection of and registration into courses.

Course equivalents
Some arrangement must be negotiated with the partner institution's registrar—and approved by the appropriate academic bodies—to reflect the special status of the exchange program courses on students' records. Your institution may wish to have special course numbering—e.g., EXCH1xxx—to indicate these courses.

Approval process
Since every certificate, diploma and degree program—and every discipline and subject area—has requirements that must be met before a credential is granted, it is important that each course taken elsewhere is carefully assessed for its equivalence. This usually involves consultation with relevant departments to have the course approved for transfer of credit before students depart. The approval process should be established when setting up the exchange program(s).

Course load requirements
Some attention should be paid to determining maximum and minimum course loads required by the program and the maximum number of transfer credits that can be applied toward a degree, diploma or certificate. In general, exchange students are encouraged to take the equivalent of a full course load at the host institution but it is often difficult to determine what this may be. Consultation with the relevant home disciplines beforehand will help to avoid problems later.
**Tuition and fees**

Exchange students usually pay tuition to the home institution equivalent to a normal, full-time enrolment, even if they are taking a somewhat reduced course load at the host institution.

Your institution may decide to charge a program fee to help offset the costs related to the exchange program. Like most changes in academic policy, an additional program fee will likely be subject to the approval of the institution's governing bodies.

An example of fees would be a $50 non-refundable application fee and a $200 program administration fee. Half of the latter could be required at the time of application and the rest due at the end of the student's first term abroad. The initial portion of the fee would be refunded to students who are not selected for the program or who are selected but unable to participate.

**Transfer of credit and grades**

Once exchange students have completed their programs, they are responsible for ensuring that the appropriate official documents are forwarded to their home campus for assessment and inclusion in their academic transcripts.

Upon receipt, the Registrar confirms whether course credit will be formally granted according to the arrangements made at the time of registration. If the grades are to be converted, the grade equivalents are awarded at this time as well.

Grading practices differ from institution to institution and country to country. It is rare to find the equivalent of the North American system of letter or number grades. Your institution may decide to award pass/fail marks instead. Make sure that transfer credit and grade conversion (not pass/fail) is done in a manner so that returning exchange students are not penalized when applying for scholarships or for further study.

**Registration for returning students**

Arrangements should be made to facilitate the registration of exchange students returning to home campus programs after the conclusion of their time away.

**Registrial issues for incoming students**

All of the issues in this section should be examined with respect to incoming students. The level of English language proficiency needs to be clearly specified and whether or not a minimum TOEFL/IELTS score is required. It is important that your partner institution completely understands your institution's expectations of visiting exchange students. You may arrange for preferential registration dates for incoming students to ensure their registration in the courses they designate.
POLICIES AND PROCEDURES: OUTGOING STUDENTS

Objectives
At the end of this section, you will be able to:
• implement the application process
• facilitate the selection process
• plan orientation programs.

Application process
Once a student has selected a program, they complete an application form (see Appendix B for a sample form) and submit it by the pre-determined deadline. Supporting documents are normally required. Recommended application requirements:
• a transcript of their academic record
• a resume outlining their background: education, work and volunteer experience, skills and abilities, hobbies and interests
• a recommendation from a faculty member attesting to the student's academic achievement and ability to study independently
• a study plan or description of the courses they wish to pursue at the host institution.

You may also want to ask for:
• a rationale outlining their reasons for selecting the programs for which they are applying, including
  - how the course taken at the host institution will contribute toward the successful completion of the degree, diploma, or certificate
  - how the exchange opportunity will impact the student's plans for a career or involvement with community work
  - their commitment to contributing to international activities on and off campus on their return
• a recommendation from a community member attesting to the student's ability or readiness to live independently in another culture
• a language proficiency evaluation
• an exchange student budget worksheet.

If you have more than one exchange program and the programs are committed to sending a set number of students in a given year, you may want to encourage students to apply for more than one program and to rank them according to preference.

Application deadline
Students need to be selected at least six months before their scheduled departure, as participants will need time to finalize the course selection and host institution study plan with their academic advisors. Since the selection process can be fairly protracted, it is a good idea to allow at least four months and to set an appropriate application deadline.

Provide a checklist of required documents with deadlines for submission to ensure that they are complete. Inform students of the approximate dates for interviews. Make sure they
understand the selection process and criteria. Spaces are limited and remind them that this is a competitive process.

**Selection process**

Normally, selection is conducted by a committee or committees comprised of a faculty member and a program administrator. (Students cannot participate in reviewing the confidential academic transcripts of other students.) You may wish to enlist the help of faculty from all the participating disciplines or subject areas covered by your exchange programs. Ensure that the selection criteria are clear to all members. They normally include:
- academic performance
- the proposed course of study
- the stated rationale for participating
- personal maturity and suitability for the exchange.

The selection process normally has four phases:
- review by each committee member of all applications
- initial meeting to short-list candidates for interviews
- interviews
- final meeting to select participants.

Before the first meeting, each committee member should have ample opportunity to review all the applications. At the first meeting, you should review the criteria for selection and state the number of participants for each program involved and the anticipated number of students to be interviewed.

Interviews can be relatively unstructured. A faculty member associated or familiar with the program is normally the lead interviewer. An administrator of the program may be present at the interviews as well to ensure personal maturity and suitability for the exchange.

Once the interviews are complete and the assessments made, the committee determines the participants. Normally alternates are chosen.

Although the selection process is time-consuming, the opportunity to meet students face to face to discuss their international interests is one of the most rewarding parts of the job.

**Informing applicants**

All applicants should be notified of the results of the selection process. This can be done by sending acceptance and rejection letters and/or by posting a list of accepted candidates (normally listed by student number).

You may want students who are accepted as participants to read and sign an Exchange Student Agreement (see Appendix C for template). They will want more information about their host institution immediately, so it is useful to prepare an outline of the process, i.e. what information will be available and when. This handout should include important dates,
such as the departure date, pre-departure activities, visa and inoculation information, etc. Follow up with a study abroad program information manual.

**Orientation**
An orientation session should be held for all students participating in exchange programs. Suggestions are provided in Section 4.

**Final report**
Students returning from an exchange should be encouraged to complete a final report. These reports can be used to assess exchange institutions and to provide information to future students who want more information about a specific program or institutional partner. An example of a sample set of guidelines is included in Appendix D.

**POLICIES AND PROCEDURES: INCOMING STUDENTS**

**Objectives**
At the end of this section, you will be able to:
- select the contents of a pre-arrival information package
- understand the importance of liaising with other campus units.

Unless the agreement with the partnering institution stipulates otherwise, your responsibilities for incoming students begin after their selection. So before they arrive, you need to send them a pre-arrival information package.

**Pre-arrival information package**
In most cases, your Registrar's Office will already have information for international students such as housing, applications, information on student fees and instructions for registration. You may be able to use these without modification or adapt them as is necessary.

The information package may include:
- formal acceptance letter (necessary to obtain a student visa)
- visa requirement information
- housing information, brochures and application form
- academic calendar with dates for orientation, registration, first day of classes, holidays, etc.
- notice of any additional academic fees, if required
- a visiting exchange student information form to be completed and returned.

**Visiting Exchange Student Information Form**
You may want to develop a pre-arrival information form asking the visiting student specific questions:
- basic application type information (name, date of birth, nationality)
- TOEFL/IELTS score (to be sent by testing agency or home institution)
- latest official transcript (validated by the home institution)
- study plan
• housing requirements.

Close co-ordination with the Registrar's Office and the international student office is very useful to facilitate the proper registration of exchange students. International students will welcome any arrangements that can be made in advance to ease the registration process. It may be helpful to send a list of the names and study plans of all incoming exchange students to the Registrar, noting any special arrangements that you may have negotiated in advance with departments to allow these students special access to courses.
SECTION 3

ESTABLISHING AND MANAGING FIELD SCHOOL PROGRAMS

Purpose
A field school provides a group of students with a unique combination of work and the experience of another culture. Establishing and Managing Field School Programs will help administrators in post-secondary institutions organize programs that can be tailored to meet the special circumstances of the institution.

Objectives
By the end of Section 3, you will be able to:
• identify the main elements of a field school program
• understand how to develop a proposal
• identify the administrative support required when implementing the program
• understand the roles of faculty and the Study Abroad Co-ordinator.
THE ELEMENTS OF A FIELD SCHOOL PROGRAM

Objectives
At the end of this section, you will be able to:
• identify the strengths and weaknesses of field school programs
• identify components of effective due diligence and risk assessment for potential programs.

What is a field school?
A field school is a structured program for a group of students that takes place outside the traditional classroom, supplementing the students' academic training with the experience of focused, problem-based study in another culture or environment. There may be an on-site partner, such as another post-secondary institution, a business or an organization. A field school program may be confined to one discipline but it is often interdisciplinary in approach. Frequently, these programs are located in a country where students learn a new language in another culture, or they provide hands-on experience such as an archaeological dig, an ecological improvement project, or resource management in a community. Sometimes they are practicums for future teachers, nurses or social workers, etc.

Because they take place outside the institution's walls and are problem-centred, field schools vary in length and design. Proposals are normally generated by faculty and developed by them but administered by a study abroad office. Some academic credit is normally attached to participation in a field school but some institutions have non-credit programs.

Advantages and disadvantages of a field school
A field school program normally offers students cultural immersion and hands-on participation in field research while putting theories learned in the classroom into practice. The learning extends beyond academic study to many aspects of group dynamics, community relationships and daily living.

The homogeneous group nature of a field school provides a comfortable setting for students who might feel uneasy about venturing out alone into another culture.

Establishing a field school is complex and time-consuming. Unlike exchange programs, in which students are incorporated into existing academic programs, field schools have to be developed from the ground up. They require a significant commitment of faculty time to identify the project and locale, to establish local contacts and to develop the project.

You may be required to co-ordinate all the housing arrangements, classroom space and whatever else is required. Because each field school is different, defining the roles, responsibilities and levels of supervision within each one will vary.
Due diligence and risk assessment
Performing due diligence and risk assessment will help institutions weigh the potential problems against the benefits. A proposal for a field school should demonstrate how it will:
- complement existing academic programs
- benefit students academically
- maintain high academic standards
- be financially feasible without placing unreasonable costs on participating students.

Questions about the locale might include:
- the relative cost of living of the host country
- the living arrangements available to visiting students
- the potential health risks students may encounter
- an assessment of the political situation of the partner's country and the potential for threats to the safety and security of the visiting students.

Finding answers to these questions may involve some research on your part. Faculty sponsors should provide you with some of this assessment and background information. For information and advice, contact other institutions that have conducted similar field school programs and arrange a visit to the proposed location. Determine how much support your program can expect from local institutions. Ideally the local institutions will have had experience hosting or supporting field schools.

DEVELOPMENT OF A FIELD SCHOOL PROPOSAL

Objectives
At the end of this section you will be able to:
- identify the process of the development of a field school proposal
- understand the role of faculty
- estimate costs.

Proposal development
The development of a field school comes about in two stages, with faculty and the study abroad administrator assuming different roles in each one. The first stage is the development and approval of the field school program proposal. The second stage is the implementation of the program.

A department or faculty usually initiates the proposal, with one or more faculty members taking the primary responsibility for outlining the proposal. If the field school is to grant course credit, institutions will subject the proposal to the same procedures used in assessing any new course. It should include:
- a proposed calendar entry outlining the subject matter, prerequisites, year level, duration and number of credits earned
- an explanation of how the field school program relates to the existing department or faculty program
- the designation of a host partner institution or organization and/or locale
• an estimate of the student demand for the field school
• the number of faculty members required
• proposed dates and itinerary
• a description of the appropriateness of the site and the facilities available for hosting the school
• support from other related departments or faculties
• other information, as required by your institution.

It is up to the faculty member(s) and/or department/faculty to ensure that the field school proposal meets the academic requirements of the institution. The role of a study abroad administrator is to assist the faculty member(s), as requested, in drafting the proposal. You may wish to supplement the proposal with information specific to field school programs, such as:
• risk assessment
• normal student selection criteria and process
• eligibility requirements for the students
• minimum and maximum number of students required for viability
• sample documents used for study abroad programs, such as a student application form, liability waiver, etc. (See Appendices B,C,D,E)
• estimated student costs
• estimated costs to the institution
• program budget.

**Estimating costs**

Much of the information above can be obtained through informal consultation with experienced study abroad administrators at other institutions. Costing and pricing are perhaps the most difficult elements to determine. Here are some questions that you might consider in estimating the costs and pricing of a program.

• What do other institutions charge for similar programs?
• Are developmental costs to be amortized into program fees and if so, over how many years?
• What are the costs of the program (faculty, room rentals, and all other direct costs of the field school)? If faculty are not paid directly but given time off in lieu, for example, how are these costs calculated?
• What are the costs of instructional materials and/or equipment that will be provided by the institution?
• Are program fees expected to cover faculty costs such as travel, accommodation, and meals?
• Does the institution's liability insurance cover an off-campus program or do you need special coverage?
• Will you charge a differential fee to special groups, such as international students or students from other institutions?
• Will you charge a non-refundable application fee to cover administrative costs related to the program?
• Is your program expected to earn a profit? If so, how much?

When determining or estimating the fixed costs of the program—don’t forget to include the incidental expenses, such as telecommunications and a contingency fund—then calculate the individual fixed costs for the minimum enrolment to cover expenses. This total should include the normal tuition cost for the course credit equivalent of the field school and the profit that the program is expected to deliver, if any.

Individual participant costs can be calculated separately and you can decide whether to list them by themselves or as part of the whole package price. They will include:
• return transportation
• accommodation and meals
• ground transportation
• field trips
• health insurance.

Participants need to know if some items are not included in the basic price, such as:
• books
• flight insurance
• medications and vaccinations
• passport and visa costs
• personal travel
• personal expenses.

It would be helpful to provide students considering a field school program the estimated costs for these additional items.

**IMPLEMENTING THE FIELD SCHOOL**

**Objectives**

At the end of this section, you will be able to:
• identify the membership and role of an advisory committee
• understand your role in providing administrative support
• outline the responsibilities of faculty involved in the field school.

Once the field school proposal has received approval, your role becomes more prominent. The Study Abroad Office can be the most convenient location for handling the selection of candidates and managing the logistics of the program, although if a field school program is specific to a department, the department may be actively involved in the administration of the program.

**Advisory committee**

The establishment of an advisory committee is recommended. Unlike exchange programs which usually continue from one year to the next and normally involve students from any department of the institution, field schools are specific to a project and a department or
faculty. They may not necessarily take place every year. Therefore, an advisory committee can be relatively small and confined to people who have a direct interest in the operation of the specific program.

The advisory committee can be useful in:
- identifying the target market for the field school—whether limited to students already enrolled in your institution or open to students from other institutions
- reviewing the program outline to help identify the on-site support that will be needed
- establishing selection criteria for students and faculty
- reviewing applications and interviewing student candidates.

**Administrative support services**

The Study Abroad Office usually provides administrative support for the field school program. It is frequently your responsibility to make information about the program available to the target audience. Information should include:
- program description
- proposed dates and itinerary
- course and year-level prerequisites
- course outcomes and grading system
- courses credits to be earned
- program costs and estimates for additional expenses (travel)
- minimum and maximum number of participants
- application deadline
- application form
- application fee (if any).

Whether you are working with a faculty member or an advisory committee, you may be responsible for the on-site arrangements. These can include:
- co-ordination with a host institution or organization
- accommodation
- meals
- classroom space
- ground transportation.

As well, you may be asked to oversee the preparation of course materials and course packages for the participants under the direction of a faculty member.

Usually you or another member of the study abroad staff coordinates the application and selection process and sits on the selection committee.

**Pre-departure information**

When the participants (and alternates) have been identified, you should provide pre-departure information about the following.
DEPARTURE AND RETURN DATES
If travel is being arranged as a group, then an itinerary must be developed. If students are only required to meet on-site, a clear schedule and location map must be prepared which includes an emergency contact in case of schedule/location changes, etc.

TRAVEL PLANS
If travel is coordinated by your office, once the number of participants has been confirmed, the administrator can arrange the travel.

VISA AND PASSPORT REQUIREMENTS
Participants should be advised regarding the necessary travel documents and encouraged to obtain these in due time.

REQUIRED AND RECOMMENDED IMMUNIZATION
Participants may need booster shots or other vaccines, depending on the country.

BRIEF DESCRIPTION OF THE SITE
This information can be prepared either by you or the faculty member.

DETAILED COURSE OUTLINES
The faculty in charge of the school normally prepares the course outlines.

COURSE REGISTRATION
Special provisions for registering in the field school course may be necessary, especially if departure is planned before the normal academic year’s registration period.

ORIENTATION DATE
Make sure that orientation is close enough to the time of departure that the information does not get stale but allow enough time for participants to make use of it.

RELEASE DOCUMENT
The following document is useful: Field School Release of Liability, Waiver of Claims, Assumption of Risks and Indemnity Agreement. See Appendix E for a model.

You may want to include a student agreement based on the model in Appendix C.

Faculty responsibilities
After on-site arrangements have been completed and the participants selected, the faculty leaders of the program usually take charge. It is useful if you review with them the broad outlines of their responsibilities.

Before departure faculty leaders should:
• design the academic plan for the field school program
• provide a detailed course outline for the participants
• become informed about country-specific issues
• prepare a field school budget
• lead student information meetings and pre-departure orientation
• have a clearly developed emergency plan(s) in place.

During the field school, faculty leaders should:
• be available to participants for all needs relating to academic, health, emotional, travel and logistical issues
• teach at least one course
• liaise with the partner institution
• communicate periodically with the home institution and in any emergency.

After the field school, faculty leaders should:
• submit student marks for all courses
• submit a financial statement and detailed accounting record of expenses together with a reimbursement of any remaining funds
• submit a final trip report.

Debriefing
After the completion of the field school program, it is extremely useful to obtain student feedback. You may want participants to complete an evaluation form based on the model in Appendix F.

It is also recommended that a short time (3 weeks – 1 month) after students have returned and had time to reflect on their experiences, that they be invited to a facilitated discussion of their experience and how it has impacted on their life in Canada. Faculty participation may be considered at this event.
SECTION 4

COMMUNICATIONS FOR STUDY ABROAD PROGRAMS
PROMOTION, ADVISING AND ORIENTATION

Purpose
After programs have been established, you will need to communicate with a variety of constituents. You may be responsible for promoting the programs to prospective student participants, senior administrators, faculty, staff, the community, and partner institutions and organizations. Disseminating information about the programs and the services that you provide is important to their ongoing success.

Throughout the promotion and administration of your institution's study abroad programs, you will be asked for advice. You may be called upon to provide information on a one-to-one basis, for example, to prospective participants, participants with special needs, and returning study-abroad students; or to groups, for example, faculty members in a department.

When program participants have been selected, your office will need to inform them about the responsibilities and challenges they will likely face. The suggestions for orientation presented here can provide a basis for joint workshops by you, past students, international students from the host country and the faculty involved.

Objectives
By the end of Section 4, you will be able to:
• understand the importance of providing accurate, timely information
• discriminate among the various types of communications media
• appreciate the value of various advising functions
• understand the content needed for orientation.
PROMOTION

Objectives
By the end of this section, you will be able to:
• identify the constituencies with whom you want to communicate
• appreciate the importance of visibility throughout the year
• recognize the different communications media.

Communicating information
Promotion is communication intended to raise awareness or interest in a particular product or service. Ensuring that interesting and accurate information is distributed to people about your programs is key to their success. All the constituencies that you want to contact will support your programs more readily if they are adequately informed about them and like what they hear.

When considering promotion, remember that your audience will want to have substantial information, not just praise of the program. Make sure that you have something concrete to say. Provide some anticipated outcomes, and/or how this program can impact future academic, employment or cultural pursuits.

Next, decide what sort of message you want to transmit. In the case of study abroad programs, it might be a good idea to start by considering the objectives of the programs.

Your strategy should focus on the benefits these programs provide, not on the nuts and bolts of how a program works. Avoid, for example, narratives that describe negotiations between partner institutions and highlight instead the number of people who will be involved as participants. Information should be relevant to the audience. Lists of names of participants are not interesting unless you include the nature of their affiliation with the institution: "Jane Doe is a third-year commerce student interested in international business."

Who needs information?
Each promotional strategy should begin with identifying the audience.

Potential participants
First and foremost, these programs are designed for students. They are the primary audience for your communications and promotions strategies. Because the concept of study abroad may not be familiar to them, it is important to reach out to them, rather than simply having information ready should they come to you.

Bear in mind that students listen to other students. Use returning students and on-campus international students as a means of getting your message across.

Internal administrators
It is critical for study abroad programs to build support within the institution. Because the programs often cross the traditional disciplinary boundaries and because they combine
academic and administrative services, they do not always have the automatic endorsement of existing units. Without careful attention to building and maintaining the support of other areas in the institution, your program may be overlooked when it comes time to distribute needed resources.

Identify your natural allies. These may be:
- academic departments with close links to your program
- the international liaison for incoming international students
- units or offices involved in alternative programs, such as work-study and continuing education.

Faculty members with students involved in study abroad programs, or with students interested in various programs, should be kept informed. Communication takes time, however in the long run, you will find that good, open communication with people will invoke confidence in the programs which in turn may speed up the approval process and garner needed support with senior administrators.

It is clear that study abroad programs and those for incoming international students share many interests and concerns. Keeping in touch with your international student liaison may bring benefits in shared information and a common front when facing unexpected difficulties.

Communicating often with other alternative programs (such as co-op) can yield many similar benefits. Such alliances may also produce imaginative co-sponsored programs, not to mention the potential overlap in the students each program attracts.

Make sure that senior administrators and academic deans are kept informed of the program developments that affect them. It is also important to remember that they are busy people and it is best to avoid "information overload."

**THE CAMPUS COMMUNITY**

Understanding how your study abroad programs fit into the academic and administrative structure and how best to communicate with decision-makers is extremely important. Make sure that you know your facts about participation in your program and have accurate and up-to-date information available at your fingertips.

Beware of the "ghetto" trap. It is tempting to communicate primarily with those who are already familiar with your programs. However, you want the best students for your programs. Spreading the word through the campus newspaper or through study abroad fairs, for example, will help to bring them to the attention of the broader campus community.

**THE EXTERNAL COMMUNITY**

Depending on the administrative structure of your institution, there may be a communications centre whose role is to disseminate information to the greater community. If this is the case, you should establish an ongoing link with the centre so that it has the necessary information to produce timely news releases about your programs.
If you are on your own to communicate with the “larger world”, you may find that your press releases are routinely ignored. If this is the case, talk with a reporter with the local news outlet and find out what sorts of things are likely to get coverage. Don't overlook communicating directly with service organizations, such as the Rotary Club which itself is involved in study abroad programs.

**When should I communicate?**

Obviously, the departure and return of students provide you with major news stories that inform a variety of groups about your programs. However, you should remember that people need to be reminded of your program throughout the entire program. Think about developing appropriate means for communicating in between the high points. On the other hand, be careful about overdoing it. A monthly newsletter with little by way of content is less effective than one that comes out every other month with news articles and information.

Being on campus and sitting on campus committees helps to keep you and your programs visible. Involve as many people as possible in program development so that they all have a stake in the success.

**Materials and methods**

Each medium has advantages and disadvantages. Consider them carefully as you decide which to implement.

**Print materials**

When starting up study abroad programs, it may be worthwhile spending some time developing print materials for effective promotion. You should consider adopting an identifiable style and—consistent with your institution's policies—a logo. Don't try to include all the information about every program in one information booklet. Consider creating a set of flyers, each focused on one aspect or program, that can be mixed and matched. This method allows you to customize your promotion: an individual flyer can be included, for example, in first-year student information packages, or they can all be combined in a folder. If the information on one program changes and the flyer becomes dated, you need only update it and not the rest. Single flyers might be devoted to:

- general description of a program
- requirements for candidates
- dates and costs
- descriptions of host countries, amenities, etc.
- travel information: visas, inoculations, etc.

Other print options include posters, postcards, and bookmarks available free through institutional outlets such as the bookstore and the library.

Print materials should be:

- uncluttered and easy to read
- informative
• accurate
• interesting
• designed according to a consistent “look and feel”.

They should also be:
• cost effective
• easy to reproduce
• easy to modify and update
• easy to distribute.

Make sure that the programs are represented in the institution's promotional literature. Work with the high school liaison unit or other recruitment areas to develop materials for distribution to prospective students.

Study abroad programs should be listed in the institution's academic calendar. It is important to include accurate and inclusive information on:
• programs
• policies and procedures
• eligibility
• transfer of credits
• funding
• application deadlines.

**News stories and newsletters**

Placing a story in the alumni publication and the student newspaper can be good publicity. In both cases, do not depend on these publications to write stories—be prepared to write the story yourself. Returning students can be persuaded to submit articles, either while abroad or after their return.

Newsletters, even if they are simply two sides of a single sheet, can be very effective in keeping people informed of events, updates, the introduction of new programs, and changes in current ones.

Use ads in the student newspaper to remind students of specific events or deadlines for applications.

**Word-of-mouth promotion**

Often the best promotion is by word-of-mouth. Well in advance of application deadlines, organize and advertise regular information sessions or “Brown Bag Lunches”. These sessions should be well advertised, with special notices sent to relevant faculty members. Invite returning students to describe their experiences.

Request to be part of the first-year students' orientation.
Seek permission from faculty with ties to the programs to make in-class presentations about your programs. Make these brief and emphasize information sessions are the opportunity to meet exchange students and returning students, the location of your office and application deadlines.

**Study abroad fairs**

Team up with the careers office, student placement, alternative education units, student organizations, and any other interested groups to organize a one- or two-day fair highlighting opportunities for students outside the traditional academic stream. These fairs offer you the chance to promote an array of programs at the same time and give students the chance to browse. Invite exchange students and returning students to host the information tables.

It may be useful to construct an "alumni photo wall" which can be displayed at events such as these.

**Electronic communications**

The internet, electronic mail and moderated discussion lists provide inexpensive and useful means of communication and promotion. Examine each one in light of what it provides for your program and how much person-time it is likely to demand.

**THE INTERNET**

It is useful to have a site on your institution's web site. It should contain all the information that a student needs to understand the nature of the programs and their requirements. It should also have appropriate links to:

- travel information
- health advice for travellers
- visa regulations and passports
- financial aid, grants and foundations
- international career information.

A web site can extend the reach of your study abroad programs considerably, providing up-to-date information across campus and around the world. It must be well designed and well organized to be effective, and you will have to consider the time and expertise it may demand. If you choose to move beyond simply presenting an "electronic brochure," such as web application forms, it will take experience to learn what links will be helpful to your audience and what information to feature.

Bear in mind that the site must ultimately be accessible to your international partners and their students, so avoid inclusion of technology that may be too advanced.

**ELECTRONIC MAIL**

E-mail is a fast, inexpensive way to communicate information to large groups of people and an invaluable tool for dealing with an international clientele. By creating separate distribution lists for bulk mailings for sending information or making announcements, such
as informing students of a new requirement or announcing the date of a study abroad fair, you only need to type one message to distribute it to the entire specified list.

Since files can be sent electronically as e-mail attachments, sending such things as pre-departure packages by e-mail saves money and time. Newsletters can also be distributed throughout the institution. However, you should keep in mind that not all e-mails are received or read and acceptance letters or documentation required for visa purposes may still need to be sent via the post.

**MODERATED ELECTRONIC DISCUSSION LISTS**

These lists are an extension of e-mail in which everyone on the list shares the messages and replies. They can be extremely effective in bringing a group together through mutual interests. However, it takes a significant time commitment to oversee the posting and providing information to subscribers.

**ADVISING**

**Objectives**

By the end of this section, you will be able to:

- understand your role as an advisor
- help students through self-assessment
- be ready to advise students with disabilities
- understand the roles of the professional international advisor and student advisors.

**Your role as an advisor**

As an advisor, you play a key role in helping potential students decide on a program and preparing them for the experience. As an advisor, your role is:

- advising students on options available through your institution
- advising students on options available through other institutions
- being available to listen to a student's concerns about going abroad
- facilitating the application and credit transfer process for students
- providing re-entry support.

The resource centre, as described in Section 1, is an essential element in the advising process. Even if it is simply several shelves of material on the programs in your office, it can provide potential participants with much of the information that they need.

**What participants need to know**

Participants need to know both about their study options and about the country they will be visiting. Faculty members should be responsible for providing advice on the final selection of an academic program but you should be ready to provide information about the facilities, support services and unfamiliar aspects of life participants can expect to find in the host country.
Providing potential participants with materials for a self-assessment may help them to research their various options. Determining why they want to go abroad will also help to clarify what they want to do. Here are some of questions to include:

- Why do I want to go abroad?
- Do I fit into the study abroad programs offered by my institution?
- How adaptable am I to new conditions, foods, and ways of thinking?
- Do I tend to set goals and stick by them until I have succeeded?

**Advising potential participants with disabilities**

Students with disabilities can certainly participate in international programs, but it is important to determine what accommodations/arrangements they may need to make in order to adapt to an unfamiliar environment. Only they can make the final decision, but you can help by pointing out some of the hurdles that might stand in their way.

**STUDENTS WITH PHYSICAL DISABILITIES**

Mobility International is active in encouraging programs and institutions to serve students with physical handicaps. Potential students with disabilities should check their web site for information: [http://www.miusa.org](http://www.miusa.org).

**PRE-EXISTING HEALTH CONDITIONS**

Students with medical conditions must take special precautions and prepare for managing their health while away from home. Students should be aware that some other cultures are not as sensitive as North Americans to conditions such as allergies. Foods may not be labelled or ingredients fully identified. Students on medication must either take a sufficient supply to last them or make special arrangements before departure.

**EMOTIONAL OR MENTAL CONDITIONS**

Students with known emotional problems or mental illness may find that an international experience intensifies their condition. The social support that they have at the home institution may not exist and there may not be any adequate substitute. It is important that you discuss frankly with such potential participants regarding the stress, culture shock and academic and social pressures of a study abroad program.

**Professional international advisor**

People who are administering study abroad programs do not normally have training in counselling, even though a significant part of the job requires advising students. Ideally, it would be beneficial if you can arrange to coordinate advising roles with a professional advisor, perhaps someone who is already in place to help incoming students. Where that is not possible, consider maintaining on-going links with your institutions' counselling service.

**Student advisors**

Students who have had experience with study abroad programs can be helpful by participating in preliminary advising sessions. They can talk to potential participants to
discuss motives and goals and highlight some of the joys and problems of a cross-cultural sojourn.

**ORIENTATION**

**Objectives**
By the end of this section, you will be able to:
- identify the documents required for travelling abroad
- identify the documents recommended for studying abroad
- discuss how to handle money in a foreign country
- help participants anticipate and deal with culture shock.

It takes a great deal of courage for someone to leave familiar surroundings and immerse themselves in a new environment. Students participating in study abroad programs need to be aware of the challenges they will be facing. As study abroad co-ordinator, you can help students by outlining the sorts of preparation they can make to ease the transition.

Organizing an orientation for the participants—which may be hosted by faculty members and past exchange students—is a good way to provide them with information that they will need.

**What participants need to know**
Before the orientation session, talk to people who have been to the host country and see how they handled various situations. There are several useful manuals you can consult. BCCIE has developed an orientation manual for its student awards and grants program. WSAnet, a university consortium in Ontario, has recently published *Ready, Set, Go! An Interactive Predeparture Workbook for Students Going Abroad* (WSAnet, 1999). Some of the following information has been adapted from these sources.

**Travel requirements**
Participants should have all the documents necessary well in advance of their departure date.

**Passports**
If participants do not have a passport that will be valid for the entire duration of their time abroad, they should allow sufficient time to apply for one, a minimum of ten days in person, longer by mail.

**Visas**
Some countries require visas. You should alert participants about the visa requirements for the countries that they will be visiting. Depending on what is required, it might take several months to get one. If participants are planning to travel outside the host country during their visit, it would be worthwhile for them to apply for a multiple-entry visa. The host country consulate or embassy in Canada will be able to inform you of the best visa for the situation.
HEALTH DOCUMENTS: IMMUNIZATION
There are three types of immunization: routine vaccines, recommended vaccines, and required vaccines. A check with the local public health unit can provide you with information about which ones are appropriate for the countries the participants are visiting. They can obtain an International Vaccination Certificate from these units as well.

CANADIAN CUSTOMS CERTIFICATES
These certificates list personal valuables that participants plan to take with them. They must be completed and verified by the Canada Customs and Revenue Agency before leaving, as proof of prior ownership.

INTERNATIONAL DRIVER'S LICENCE
Although an international driver's licence is not always required, participants can obtain one from the British Columbia Automobile Association for a nominal fee.

INSURANCE
Participants should contact their provincial health insurance agency and make any arrangements necessary either to maintain the insurance while they are away or to have it re-activated upon their return. It is important to know whether your overseas medical coverage includes:
- hospitalization costs
- a trip home in medical emergencies
- dental coverage
- claim procedures.

Recommended precautions
There are a number of additional useful measures that participants may want to take.

DENTAL CHECK-UP
It is a good idea if participants have their teeth examined by a dentist before leaving to get all necessary work done by a familiar dentist.

COPIES OF MEDICAL RECORDS AND PRESCRIPTIONS
Students should be encouraged to make copies of medical records and prescriptions—and to pack an extra pair of eye glasses.

The following items are not compulsory, but may be extremely useful if participants ever need to prove their identity.

NOTARIZED COPIES OF BIRTH CERTIFICATE AND PROOF OF CANADIAN CITIZENSHIP
These will be invaluable if a passport is lost or stolen. They can be presented to the closest Canadian embassy or consulate to have a duplicate passport issued.
PHOTOCOPIES OF THE IDENTIFICATION PAGE OF A PASSPORT
These can be taped to the inside of a suitcase as proof of ownership in the event a suitcase is lost; a second copy should be accessible for easy reference.

PASSPORT PHOTOGRAPHS
Additional photos are useful for identification cards and visas in the host country.

ACADEMIC TRANSCRIPTS
Copies of institutional transcripts may be useful for a variety of immigration requirements, and they are easier to get before departure.

Money and banking
During the orientation sessions, be prepared to answer questions about currency exchange.
• Are there any restrictions regarding the amount of money that can be brought into or taken out of the country?
• Does the Canadian dollar exchange as easily as the American dollar?
• Is it possible to change the local money into Canadian dollars before leaving for home?
• Will it be difficult to transfer money from Canada?

Encourage participants to exchange $100 or more into the host country currency before leaving Canada. This money will be useful when they first arrive to cover food, local transportation, tips and unexpected minor purchases.

TRAVELLERS CHEQUES
Find out whether participants can rely on banks and bank machines or whether travellers cheques are the best way to carry money. Check with the embassies or consulates. Find out whether it is difficult to cash traveller’s cheques in Canadian dollars or it may be preferable to purchase American dollar traveller’s cheques.

FINANCIAL ARRANGEMENTS
Be prepared with information about the availability of banks in the host countries. Some chartered Canadian banks have branches or subsidiaries in other countries. If they do not, participants should be encouraged to use larger international banks (e.g., Citibank, Chase Manhattan, Barclay Bank, Credit Suisse, Bank of Tokyo, etc.) for establishing an account.

TRANSFERRING MONEY TO AND FROM CANADA
Procedures for transferring money across national borders vary from country to country. Discuss the pros and cons of this with the countries' consulate or embassy and a bank to give participants an idea of what sort of charges they may encounter.

ELECTRONIC BANKING
Some countries have a highly developed network of instant teller machines that allow money to be withdrawn from a Canadian account in local currency, others do not. The host country’s consulates and embassies should be able to inform you.
Credit Cards
Warn participants that some countries have well established reputations for credit card fraud and other creative schemes using credit card slips. They should be very careful when and where they use credit cards, and especially careful with the disposal of the credit card slips.

Culture Shock
Every traveller should be told that everyone suffers culture shock to some extent. It will be important for study abroad participants to be aware of the problems they may encounter when adjusting to an unfamiliar culture and to the absence of familiar faces and friends. Laws, customs, even gestures once taken for granted may no longer apply. Their values may be challenged, and they may be the objects of racial prejudice. In some countries local laws may apply differently to foreigners than nationals.

Help them to understand that it is important to maintain a sense of respect, humour and warmth toward others, balanced with common sense and caution where appropriate. Explain that it may take longer to get things done and that it helps to maintain flexibility, a strong sense of self, and a tolerance for external ambiguities. Respect for other people and a non-judgmental attitude are vital to establishing a new network of friends; this network is a prime factor in alleviating the initial sense of loss.

Preparing Ahead
Help participants to become as familiar as possible with their host country before they leave. Counsel them to take an interest in local sites, customs, and history. Encourage them to enjoy the newness of their experience.

Suggest that participants make arrangements, before leaving home, to keep in touch with family and friends in order to ease the sense of isolation. They should have the e-mail addresses of friends and family and maintain an e-mail account that they can access on the web (like Hotmail, etc). Most institutions are on the internet and most cities have at least one internet service provider; it is a cheap, consistent way to keep in touch.

Participants will be asked while abroad to tell people about their home so suggest taking family pictures, and pictures that depict life in Canada. They might also take several small items to be used as gifts for their host(s) and some maps and posters of BC for information purposes.

Provide them with a list of international alumni contacts in the host countries. These people may be locals or expatriates who share a common educational background and may be able to help participants, especially at the beginning of their program.

Returning Home
Surprisingly, when participants return home they can expect to experience as much or more disorientation as when they entered the host country. There may be unanticipated changes in politics and economics. Perhaps their interests and values will have changed, while those of their family and friends have not. They may find friends and relatives are not as interested in hearing about their experiences as they are in telling about them.
Participants should be advised of re-entry culture shock and encouraged to manage their expectations. Some of the same survival skills that they developed to adapt to a foreign culture can be useful on their return, such as cultural sensitivity and patience. Encourage them to consider what they like about Canada and what they want to retain from their experience abroad.

Planning to share their new knowledge through a journal, scrapbook, photo collection, etc. not only gives them an ongoing project while they are away, but also helps ease re-entry trauma.

Debriefing
You might establish a re-entry workshop or debriefing for students from your institution who have recently returned from overseas study or exchange. Whether it is a one-on-one debriefing or a workshop, it can be an excellent opportunity for participants to share experiences, compare with others, learn about the re-entry process and establish a supportive group to work through issues that may come up.

As well as helping participants to cope with re-entry shock, debriefing is a very useful means to evaluate your programs. Since you cannot normally assess the programs and services available to the participants when they are away, it is important to find out from them what was successful and what needs improvement.

You can use one or more of the following tools:
- questionnaires
- interviews and/or evaluation sessions
- reports from on-site staff or faculty.

The evaluation form for field schools in Appendix F is a helpful model.
SECTION 5
RESOURCES

Objectives
At the end of Section 5 you will be able to:
• understand your role as an information provider
• understand the information available through government agencies.

Your role as an information provider
One of your major challenges is to evaluate what information and what sources of information to use. While you are an expert at your job, this does not mean that you have to be an expert on every issue related to international education. Your responsibility is to point out the main issues students should consider and to provide information on how to obtain more detailed material.

Types of information
It is important to be aware of the variety of resource materials available in order to determine which to use. You will refer to some sources on an on-going basis while others are most useful when developing a new program or service. If you are responsible for a resource room, then purchasing decisions must be made about books, journals, magazines, newsletters and videos. You will have to decide which organizations to join. Most memberships include information mailings, journals or newsletters.

This following list demonstrates some of the various resources available and may provide a starting point for your research and information collection. Eventually, you will need to develop a resource library that reflects your programs and the interests of your students.

DEPARTMENT OF FOREIGN AFFAIRS AND INTERNATIONAL TRADE
http://www.dfait-маeci.gc.ca
The Department of Foreign Affairs and International Trade's (DFAIT) mandate is in part to:
• conduct all diplomatic and consular relations on behalf of Canada
• conduct all official communication between the Government of Canada and the government of any other country, and between the Government of Canada and any international organization
• conduct and manage international negotiations as they relate to Canada.
The Travel section of the DFAIT site has useful information for international study students, such as:
- travel reports
- passport office information
- a list of consular services
- assistance for Canadians overseas
- several interesting travel publications such as *Bon Voyage, but...* and *Her Own Way: Advice for the Woman Traveller*.

The DFAIT travel reports contain country-specific information on safety and security issues, health conditions and visa requirements.

**Consular Services**

DFAIT is responsible for consular services for Canadians overseas, such as:
- routine and emergency services during business hours
- emergency services after business hours
- country travel reports
- passport services.

The round-the-clock emergency service for Canadians is a service that all study abroad participants should be made aware of, in case they encounter difficulties such as family death, illness, accident, evacuation, financial problems, missing persons, arrest, detention, or lost or stolen passports.

**Passport information**

It is a challenge to stay abreast of the rules and regulations regarding passports. When talking to potential study abroad program participants emphasize that obtaining documents are their responsibility and the process takes time. The DFAIT web site is a good place to direct students. It takes about ten days to process a passport after the application has been submitted.

**International Education and Academic Relations**

The International Education and Academic Relations department is part of DFAIT. It is responsible for awards and exchanges, such as:
- Government of Canada and foreign government awards
- Commonwealth Scholarship and Fellowship Plan
- Canada/China Scholars Exchange Program
- The Foundation for Educational Exchange between Canada and the United States (Fulbright Program)
- OAS Fellowship Program
- exchange of cultural personalities
- International Youth and Young Worker exchanges
• Foreign Affairs and International Trade Canada fellowships

**Customs**

The Canada Customs and Revenue Agency monitors and controls the entry of people into Canada. Customs officers work to keep prohibited goods, such as drugs and firearms out of the country.


**NAFSA's resource materials**

[http://www.nafsa.org](http://www.nafsa.org)

NAFSA, the Association of International Educators, although American in focus, provides a wealth of useful material for administrators and participants in study abroad programs.


**BCCIE**

[http://www.bccie.bc.ca/domesticstudents](http://www.bccie.bc.ca/domesticstudents)

The BCCIE site has useful information on programs and a list of web addresses to consult for additional information on many aspects of study abroad.

**SOME USEFUL PUBLICATIONS FROM BCCIE**


**Reading list for students for study abroad**


CUSO. *Health Advice for Living Overseas*. CUSO, Canada.


APPENDIX A

EXCHANGE INSTITUTION AGREEMENT* 

Exchange Agreement for Students between  
<Host Institution>  
and  
<Home Institution>

Preamble

<Host Institution> (hereafter referred to as Host), City, Country, and <Home Institution> (hereafter referred to as Home), City, Country.  
Host and Home hereby agree to the following terms and conditions as set forth in the Student Exchange Agreement, beginning with the 20< > Academic Year and continuing each year thereafter for period of <x> years.

Definitions

For the purposes of this Agreement, the following definitions shall apply. “<Host Institution>” shall stand for that institution receiving students. “<Home Institution>” shall stand for that institution sending students as well as the institution from which those students intend to graduate, i.e., the diploma/degree-granting institution. “Academic year” shall stand for two four-month academic terms.

Terms

1. The purpose of the Agreement is to promote scholarly exchange and international understanding by stimulating and supporting academic and intercultural activities between students from the Host institution and the Home institution.

2. The Home institution, conforming to the admission requirements of the Host institution, shall assume full responsibility for the assessment and selection of qualified candidates. The Host institution shall then respect the selection so made. It is expected that the Host institution will not reject a nomination, except in extraordinary circumstances. The selection process shall consist of stringent evaluation of the student’s previous academic record, language skills, motivation, and overall potential to succeed in an international academic environment.

3. Each institution, respecting the minimum language proficiency level established by the other, shall, as part of the screening procedure, closely scrutinize the language proficiency of all potential exchange candidates. In so doing, the language requirements will be waived subject to ongoing review. Normal TOEFL

* Adapted from Simon Fraser University’s Partnership Agreement
requirements are 600 at the undergraduate level at <Host Institution> and 570 at the graduate level.

4. Each institution shall accept students from the other party on the basis of the home institution’s recommendation and according to the following guidelines:

   • Host shall accept <#> full-time <third-year> Home students in its undergraduate program for one academic year. Host will be notified of Home’s exchange student names and proposed study plan and courses at least three months prior to classes.

   • Home shall accept <#> full-time <third-year> Host students in its undergraduate program for one academic year. Home will be notified of Host’s exchange student names and proposed study plan and courses at least three months prior to classes.

   • Institutions may send students for one term rather than for two terms. Two students for one term shall be equivalent to one student for two terms.

   • When either institution would like to send more than <#> students in a given year, it is necessary to get agreement from the Hosting institution.

5. It is understood that a full-time student normally enrolls in twelve to fifteen (12-15) credit hours or three to four (3-4) courses per term. While this number might serve as a model, or a minimum, it is not incumbent upon participating exchange students to take only that number.

6. While each institution shall try to exchange the same number of students in a given year, neither party is required to do so. If/when either party does not designate any qualified students, it will not affect the other party’s ability to send students, since both institutions agree to operate on a credit system.

7. If an exchange imbalance exists at the end of any given year, it shall be resolved as follows:

   • If this agreement is continued, every attempt shall be made to correct the imbalance by adjusting the number of students to be exchanged in the following year, and for every year thereafter, unless otherwise agreed upon.

   • If this agreement is terminated, the institution having hosted the larger number of student/terms to that point shall be entitled to rectify any existing imbalance within two years from the date in which the agreement is officially terminated.

8. All exchange students shall be subject to the same academic regulations regarding class performance as those that pertain to the regularly enrolled students at the Host
institution. All exchange students shall, within reasonable limits, attempt to represent their home institution and country in the host community to the best of their ability.

9. Students who are accepted for a full academic year must be in good standing upon the completion of their first term at the Host institution, in accordance with the Host institution’s academic requirements for its regularly enrolled students.

10. It shall be the sole responsibility of the Home institution to decide on the transfer of credits each student will receive for courses taken at the Host institution.

11. If a student does not abide by the guidelines noted above, and in other exceptional circumstances, the Host institution may, after consultation with the student’s Home institution, request that the student in question returns to his/her home institution.

12. In consideration of #11 above, tuition and other fees shall be arranged as follows:
   • Each rejected student shall pay tuition and other required fees to the Host institution and will be exempted from payment of tuition and other required fees at his/her Home institution.
   • Each student shall be personally responsible for all other costs incurred due to participation in this exchange, including accommodation.

13. The Host institution shall guarantee or, where possible, assist in finding appropriate housing (on-campus or off-campus) for visiting exchange students.

14. Each student participating in this exchange must provide for his/her own transportation to and from the Host institution. Each student shall also be personally responsible for expenses including, but not limited to, personal and living expenses, travel and related costs, as well as books and school supplies.

15. All students will have normal student access to the Host institution’s health services, but costs may not be covered. However, hospital and other medical expenses are the responsibility of each student. Each student must purchase insurance to cover medical contingencies while in the host country.

16. This agreement shall continue for a five-year period, but may be terminated by either institution by official written notification duly signed by the presiding officer of the notifying party. This notice of termination must be received no later than January 31st of the year in which the termination is to become effective. If no notice of termination is extended, the agreement shall continue for a further five-year period.
In witness of the terms of this agreement, our signatures are affixed:

Host

_____________________________
Name

_____________________________
Title

_____________________________
Date

Home

_____________________________
Name

_____________________________
Title

_____________________________
Date
APPENDIX B

EXCHANGE FORM APPLICATION*

Exchange Student Application Form

Personal Details

__________________ ______________________  ___________________
Surname           Given Name                        Preferred Name

— Male            Birth date: ___________________
— Female

Citizenship Status

___ Canadian Citizen                   ___ Permanent Resident

Canadian Passport Number   Other Citizenship (list passports held)

_____________________       __________________________

Personal Identification

Social Insurance Number ________________________________________

BC Care Card Number ________________________________________

Student Number  ________________________________________

Exchange Program Choice

Note: Please check the start dates for semesters at various institutions. For example, January semesters will not begin until February in Australia.

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<th>Sept-Dec &lt;yr&gt;</th>
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<th>Summer &lt;yr&gt;</th>
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<tr>
<td>3rd choice</td>
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</table>

*adapted from the University of British Columbia’s Student Exchange Program Application
**Academic Information**
In what program are you currently registered? ______________________________

In what year are you registered in? ______________________________

What is your estimated GPA for this academic year (all courses) ________________

Cumulated GPA — all courses, all years __________________

**Language Proficiency**
List all languages for which you have proficiency and/or have studied.

<table>
<thead>
<tr>
<th>Languages courses completed</th>
<th>Languages spoken</th>
<th>Languages written</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1.</td>
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<tr>
<td>2.</td>
<td>2.</td>
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</tbody>
</table>

**Emergency Contact Information**
Primary

Name __________________________ Relationship ________________________

__________________________________
Address: __________________________

Tel: (Day) _________________________

Tel: (Evening) _____________________

Cell: _____________________________

E-mail ____________________________

Alternate

Name __________________________ Relationship ________________________

__________________________________
Address: __________________________

Tel: (Day) _________________________

Tel: (Evening) _____________________

Cell: _____________________________

E-mail ____________________________

**Reference Letters**
Please attach a minimum of two reference letters. At least one of these should be from a professor or faculty member.

Submit your application to the Study Abroad Program Co-ordinator.
APPENDIX C

EXCHANGE STUDENT AGREEMENT*

This agreement is made on <date> by <student name> (hereinafter referred to as Student) and the study abroad office <Name of Office> at <Home Institution> (hereinafter referred to as Institution).

It is the intention of the Institution to enter into agreements with various partner universities to provide for the student participation of the institutions in academic student exchanges. Student wishes to participate in the Study Abroad Program under the terms and conditions set forth below:

The Student and the Institution agree to the following:

1. Student will pay institution tuition and other fees equivalent to <#> credits for a full academic year, or <#> credits for a one semester exchange.

2. Student is responsible for all costs incurred during the exchange program, such as room and board, books and supplies, local transportation, transportation to and from the Host academic institution, and all personal expenses.

3. It is understood by all parties that the academic aspects of Institution exchange programs are such that participation for the full academic period for which Student has been selected is necessary to achieve the objectives of the program and the full performance of this agreement.

4. Student hereby grants permission for the use of his/her name and photograph for publicity and/or orientation purposes of the promotion of exchange programs in publications, audio-visual presentations and other related media.

5. Student agrees to submit an exchange experience report by the second Friday of the session that they return to the Institution. Prospective students will use this report as a resource about exchange programs.

6. Student agrees to participate in the planned information and promotion sessions to be held throughout the year, when they return to the Institution.

7. Student is required to complete Course Approval Forms for each and every course that they plan to take at the Host institution in order to facilitate the transfer of credit to the Home institution for courses successfully completed.

* adapted from Simon Fraser University’s Exchange Student Agreement
8. Student understands that withdrawal from the exchange program while they are studying at the Host institution also constitutes withdrawal from their Home institution.

9. Student has the right to withdraw from the exchange program any time prior to departure; however written notice of this withdrawal must be submitted to the study abroad office before the exchange semester is scheduled to begin.

10. The Host/Home institutions have the right to terminate this agreement and shall have no obligation upon such termination to place the Student in any institution with which the Institution through its study abroad program has a contractual relationship.

__________________________________________  
Student's name

__________________________________________  
Signature

__________________________________________  
Date
APPENDIX D

GUIDELINES FOR REPORTS BY RETURNING STUDENTS*

Returning Student Report Guidelines

Please review the questions as a guideline for writing your report. Please be as specific as possible and feel free to detail any other information that you think might be useful to a student going on exchange. We suggest that you use the same headings in your report, i.e. arrival, orientation, registration, etc. (Attach additional sheets, if necessary.)

Name: __________________________________________________________

Name of Host Institution: ____________________________________________

General Evaluation

Please rate your overall experience on a scale of 1 to 10. Explain your rating of the program. Be specific.

Arrival

1. Did you receive any assistance when you arrived in the host country?
2. What help did you receive and from whom?
3. Did you arrive early enough or would you have benefited by arriving earlier?

Orientation

1. Did you receive adequate orientation at the host institution? If yes, what did you find most useful?
2. Did you experience “culture shock” at the host institution. If yes, were you able to find people with whom you could discuss your problems?
3. Was adequate counseling and support provided?
4. Was it easy to make friends? Did you associate mainly with other exchange students or with local students or a mix?
5. Was there a co-ordinating office for international students?
6. Were you able to get all the information you needed in one place or did you have to search across campus?

* adapted from the University of British Columbia’s Student Exchange Program
Registration

1. How well did the registration procedure work for you?
2. Did you require assistance with registration?
3. Were you able to enrol in the desired courses?
4. Was this difficult to do?
5. What advice would you offer next year’s visiting students regarding the registration process?

Housing

1. What dates was housing available to students?
2. Was the housing provided adequate to your needs? If not, why?
3. Were you on a meal plan or did you cook your own food?
4. Was it difficult to find some kinds of food?
5. Are the student residences close to the academic institution?
6. Can you stay in student housing during major holidays?
7. What would you recommend as the best residence to stay in? Why?

Costs

Please detail your basic costs in CND $:

1. book costs (per term or year, please specify)
2. room and board (per month)
3. local transportation (per month)
4. extended medical coverage
5. entertainment costs
6. Did you encounter any unexpected costs? What were these?
7. What items were more expensive than you expected? Less expensive?

Other Services

1. Was the library at the host institution adequate?
2. How easy did you find it to use the library?
3. Are there computer facilities? Are they adequate?

Study Program

1. How do the courses at your host institution compare with courses at your home institution?
2. Are courses more or less difficult?
3. Is the workload heavier or lighter?
4. Is the style of teaching different?
5. What are the major differences between our institution and your Host Institution? Please be specific, (e.g., course content, interdisciplinary approach, amount of course work, method of instruction, etc.)
6. How many courses did you take in Term 1? Term 2?
7. What would you recommend as an appropriate course load for other students visiting the host institution? Are there specific courses, which you would recommend to visiting students? Why?
8. Did you find yourself at an advantage/disadvantage compared to other local or exchange students? For what reasons? (e.g., language preparation, familiarity with the institution etc.)

Extra-curricular activities/free time

What sorts of organized programs are available to students? Are there adequate sports facilities? Are there active student clubs? Intramural sports? Did you feel welcomed and included in activities? Were host students welcoming and friendly?

Were you able to travel off-campus? How would you recommend that other visiting students spend their free/vacation time?

General

What are the ten most important things to take with you when you go to your host country?

What are the five most important things you would tell a visiting student?

Is there any other information that you think might prove useful to exchange students attending the host academic institution? Be as detailed as you like.

General Impressions

Please write as much as you can about your exchange experience. Remember that prospective students are interested in reading about both good and bad experiences.

What was the most rewarding aspect of your exchange experience?
What were the biggest disappointments?
How has your perspective changed as a result of the exchange?
What steps would you take, in light of your experience, to better prepare yourself for the exchange program?
How has the experience impacted your study or career decisions?
APPENDIX E

FIELD SCHOOL RELEASE OF LIABILITY, WAIVER OF CLAIMS
ASSUMPTION OF RISKS AND INDEMNITY AGREEMENT*

Preamble
The <x> Field School Program (the ‘Program’) is an exceptional educational opportunity, but it is not without certain risks, dangers, hazards and liabilities to all participants. These include, but are not limited to, personal injury, death, property damage, expense and other loss, delay or inconvenience, and course cancellation or curtailment. All persons taking part in the <x> Field School are required to accept these and other risks as a condition of their participation in this venture.

<Institution> will not accept any liability for injury, loss, damages or expense sustained as a result of any person’s participation in the program. The Statement of Risks set forth below is intended to enable participants to better understand the various risks involved in the program.

All program participants will be required to sign the Release Agreement set forth below, which will release <Institution>, and its representatives, from any future claims which might arise as a result of the applicant’s participation in the Program.

STATEMENT OF RISKS
The Program involves the risks inherent in international travel. The majority of the Program will take place in <Country>. There are significant risks, hazards and dangers to which all travellers to <Country> are exposed. These include, but are not limited to, poor road and transportation conditions in some areas, banditry and inadequate police protection in some parts of the country, tropical and other diseases, and a different political system. The medical facilities may be of a lower standard than in Canada. <Country> has a high incidence of malaria and hepatitis, etc. AIDS is a serious health risk throughout the world. <Country> is a relatively poor country, and there is a potential for crime.

The <x> Field School Program will be using the services of independent travel agents. <Institution> cannot accept responsibility for the conduct of these independent agencies. It is always possible that the <x> Field School Program might not run to completion, or that individual courses or activities may be curtailed or cancelled, due to weather, illness, political disturbances, terrorism, motor vehicle or transportation accidents, transportation problems, political or ethnic violence, failure to perform on the part of the travel agents or airlines, problems relating to customs, immigration or visa requirements, or other circumstances either within or beyond the control of <Institution>.

*adapted from Simon Fraser University’s Field School Release Form
All participants in the <x> Field School Program will be required to attend orientation programs, safety lectures on these and other risks, and on student behaviour required to minimize risk and disruption during the course of the program. It is the responsibility of each participant of the <x> Field School Program to learn as much as possible about the risks of the venture, to weigh those risks against the advantages, and to decide whether or not to participate. <Institution>, its professors, instructors and support personnel for the <x> Field School Program cannot and will not assume liability in respect of any of these risks, dangers, hazards and liabilities. <Institution> accepts no responsibility and assumes no liability with respect to any academic, vocational, medical, financial or tax advice received by a participant concerning the <x> Field School Program.

TO: <Institution>

I, _______________________, am aware that the <x> Field School Program involves many risks, dangers, hazards and liabilities including but not limited to those referred to in the PREAMBLE and STATEMENT OF RISKS set forth above. I freely accept and fully assume all such risks, dangers, hazards and liabilities and the possibility of personal injury, death, property damage, loss, expense or inconvenience resulting therefrom.

In consideration of <Institution> accepting my application to the <x> Field School Program and allowing me to participate in the Program, I hereby agree as follows:

1. TO WAIVE ANY AND ALL CLAIMS, whether in contract or in negligence, that I have or may in future have against <Institution> and its directors, officers, professors, instructors, employees, agents, support personnel and other representatives (all of whom are hereinafter collectively referred to as "the Releasees"), as a result of my participation in the <x> Field School Program;

2. TO RELEASE THE RELEASEES from any and all liability for any loss, damage, injury or expense that I may suffer or that my next of kin may suffer as a result of my participation in the <x> Field School Program, due to any cause whatsoever, INCLUDING BREACH OF CONTRACT OR NEGLIGENCE ON THE PART OF THE RELEASEES;

3. TO HOLD HARMLESS AND INDEMNIFY THE RELEASEES from any and all liability for any loss, damage, injury or expense to any third party, resulting from my participation in the <x> Field School Program;

4. THAT THIS AGREEMENT shall be effective and binding upon my heirs, next of kin, executors, administrators and assigns, in the event of my death.

I am nineteen (19) years of age or older.

I have read and understood this Agreement prior to signing it.
I am aware that by signing this Agreement I am waiving certain legal rights, which my heirs, next of kin, executors, administrators and assigns or I may have against the Releases.

SIGNED THIS ___ DAY OF __________, 20___

Signature: _________________________________

Printed Name: _____________________________

Witness Name: _____________________________

Signature: _________________________________

Printed Name: _____________________________
APPENDIX F

FIELD SCHOOL EVALUATION FORM*

In the organization and delivery of a field school, every attempt is made to provide a cost-effective but quality academic travel program in safe and comfortable surroundings. Budget travel and budget accommodation is a necessity in order to keep the field school affordable.

Your evaluation and comments will help us improve the various components of the program. All responses will be treated with confidentiality.

In order to ensure confidentiality, you do not need to name any person or persons, or supply any information that might serve to identify yourself or someone else.

Assess the service in question, using the following scale and supply comments whenever appropriate:

A Excellent. No improvement needed.
B Good. Minor improvements might be needed.
C Fair. There is room for improvement in some areas.
D Poor. Some major problems.
F Terrible. This part of the program needs to be rethought or eliminated.

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<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
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<td>Pre-departure briefing and orientation</td>
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<td>Accommodation</td>
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<td>Supplied meals</td>
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<td>Access to communications</td>
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<td>On-site advising</td>
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<td>Overall assessment of field school</td>
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Medical

- Were there local health issues that were not addressed in pre-departure communications, orientation or health briefings? YES NO
  If yes, give a brief description.

* adapted from Simon Fraser University’s Field School Evaluation From
• Was local access to medical facilities adequate? YES  NO
   If no, how might this be improved?

Safety issues
• With reference to issues such as the potential for crime, racist or sexist behaviour, traffic accidents, security, security of accommodation, or other measures of safety, did you find that personal safety was ever a concern? YES  NO
   If yes, give a brief description and offer advice that might assist future participants.

Academic component
Rate the pre-departure class work and preparation:  A  B  C  D  F
• In future, what content or issues might be included or deleted from the pre-departure component of the academic program?
• What advice/feedback might we offer to international lecturers who taught in the program?
• What advice/feedback might we offer to the faculty member who taught in the program?

Identify each course you studied and complete the section for that course. If you comment on the instructor, please differentiate between the academic component delivered by the instructor(s) and other non-academic issues that might be relevant.

Course name

Course number

Instructor

Course assessment  A  B  C  D  F
Instructor assessment  A  B  C  D  F

• Was the level of difficulty appropriate for this course? YES  NO
• Were the frequency and complexity of assignments appropriate? YES  NO
• Was the content of the course appropriate? YES  NO

Comments:
General comments

- Describe what you consider to be the highlights or the best parts of the field school.
- Describe what you consider to be the "lowlights" or the worst parts of the field school.
- Is there anything that we should do differently next year?

Give a brief account of your travels after the end of the field school. Is there any place or destination you can recommend to future participants?

Please return completed forms to <Office>

The information on this form is collected under the general authority of the University Act (RSBC 1979, c419) and <Institution> academic policies, <#, #, #>. It is related directly to and needed by the institution in order to ensure and maintain the quality of the field school programs as well as the performance of international agents and faculty according to their assigned duties and responsibilities.

This form is to be submitted anonymously. Please be advised, however, that all comments you provide on this form or on attachments, hand-written or typed, will be supplied to the chair of the Field School Steering Committee and will be seen by the faculty person being evaluated. If you have any questions about the collection and use of this information, please contact the <Office>.