About NAIS and United Educators

The National Association of Independent Schools provides services to more than 1,700 schools and associations of schools in the United States and abroad, including 1,400 nonprofit, private K-12 schools in the U.S. that are self-determining in mission and program and are governed by independent boards. For more information, visit www.nais.org.

NAIS conducts research among schools nationally, then provides you targeted, digested reports you can use to evaluate your own practices. Our research clearinghouse also identifies external research relevant to independent schools and helps you understand how to use the findings in your work. See the full suite of NAIS research reports at www.nais.org.

United Educators (UE) is a licensed insurance company owned and governed by 1,200 member schools, colleges, and universities throughout the United States. UE was created by educational institutions to provide high-quality, specialized alternative to commercial insurance.

EduRisk from UE offers independent schools a comprehensive suite of risk management resources to address such issues as study abroad, athletic injuries, and harassment and discrimination. And, our comprehensive liability policies provide the coverage that matters most to schools. For more information, visit www.ue.org.
NAIS and UE Study Abroad Risk Survey and Summit

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Survey Executive Summary

A majority of survey respondents indicated they offer one or more study abroad programs each year (64 percent), with 89 percent of schools reporting an average program length of less than one month. While schools run international programs to many different countries, the top five destinations included Spain, France, Italy, China, and Costa Rica.

Schools seem to be still figuring out the best way to oversee and manage study abroad programs. They approach it in three different ways: centralized through a single function or academic department (34 percent), dispersed across multiple functions and/or academic departments (30 percent), and centralized for oversight purposes through a single function or academic department with multiple functions and/or academic departments responsible for managing each program offered (29 percent). Money also seems to be a challenge, since more than half of schools reported having a budget of less than $15,000 to run their international programs.

Most schools reported fewer than 50 students participating in a study abroad program each year (67 percent), while only seven percent of schools have 100 or more students. While only five percent of schools require a student to be a part of an international program to satisfy a course or graduate, many schools (40 percent) like to wait for students to reach ninth grade for them to be eligible for study abroad. Almost every school (95 percent) requires parents of student participants to sign a release or waiver of liability. In contrast, only 62 percent of schools require students to sign an assumption of risk form, which acknowledges the risks associated with the program.

While there is a formal approval process for newly-proposed study abroad programs in 73 percent of schools, only 56 percent of them have a formal process to approve or select trip leaders. However, 80 percent of schools use background checks for trip leaders. Respondents indicated that trip leaders are trained in three areas: procedures to follow during a crisis, appropriate behavior with students, and the application of the school code of conduct during the study abroad program.
Almost nine in ten schools reported pre-orientation sessions (89 percent) where students, trip leaders, and parents of student participants were required to attend. Some of the topics addressed during these sessions include respect of other cultures, risk associated with the program, health and insurance required for participants, as well as crisis response.

In the case of schools working with third-party vendors, 69 percent of respondents had written contracts with them. These contracts include proof of third party insurance coverage, insurance requirements, and emergency protocols, among others.

Surprisingly, only 52 percent of schools have a crisis management plan for their study abroad programs. However, schools tend to buy different types of insurance including general liability, health and medical assist, and evacuation.

After students have arrived to the study abroad location, close to 60 percent of schools offer an onsite orientation on local laws and customs, emergency contacts, risks of the location, etc. Hotels and host families are the most frequent type of housing provided. Twenty-three percent of schools vet host families and foreign national staff members with direct and unsupervised contact with students participating in the program. Of these schools, only 28 percent use background checks to approve host families or foreign national staff members. Of those schools hiring local vendors, only 42 percent vet them.

After concluding study abroad programs, relatively few schools use surveys to assess them or obtain feedback on participants’ experience. Thirty-seven percent of schools conduct surveys among participating students, while 46 percent ask trip leaders to complete a trip report.

Finally, survey participants mentioned their main concerns about study abroad programs, including safety of students and staff, risk management, crisis management, and the cost associated with the programs. Guidelines and best practices to mitigate risks and to guarantee the safety of participants were some of the resources mentioned as needed.
Background

Global education and programming have been hot topics in independent school education for the last 10 years. However, the risks associated with these programs have raised concerns from school leaders considering such programs. There also appears to be a lack of much concrete guidance in terms of best practices for managing risk in this evolving field. These issues reached an important head in 2013 when one independent school received a multimillion dollar verdict against it as a result of a lawsuit brought by a student for an injury sustained on a school trip.

As a result, NAIS and United Educators worked together to survey independent schools on their practices in key areas of international travel and risk management of these trips. In conjunction with the survey, UE and NAIS hosted a summit in October 2013, bringing together leaders in this area to discuss key learnings, things schools should think about, and suggested practices.

This report analyzes the data collected from the survey as well as many of the key learnings from industry professionals at that summit. By understanding the importance, prevalence, and practices of these programs, NAIS and UE will be better positioned to provide relevant and helpful resources aimed at decreasing potential risks to program participants and the sponsoring school.
Survey Methodology

On September 19, 2013, an online survey was distributed among 1,396 business officers. It closed on October 16, and received a 21 percent response rate.

The survey was designed to gauge the extent to which independent schools use study abroad programs to enrich the student experience and the efforts taken to ensure that these programs are well-managed.

For purposes of this survey, “study abroad program” refers to any school-sponsored educational program offered to students involving travel to a foreign country for up to one academic year, including programs delivered at foreign institutions, ad hoc, short-term programs led by school faculty, and experiential and service learning trips.
Key Findings

Characteristics of Study Abroad Programs

Number of Programs

More than six in ten participants in the survey reported offering study abroad programs (64 percent). Forty-six percent of them run between 1 and 4 programs, followed by those with 5 to 9 study abroad programs at 14 percent. More than a third of respondents indicated that their schools do not offer any of these programs (36 percent).

How many study abroad programs does your school offer each year?

Schools with fewer programs tended to be smaller. Of those schools with one to four study abroad programs, around a fourth had fewer than 300 students and another fourth had between 301 and 500 students, with the other half being schools with more than 500 students. In contrast, of schools with five to nine study abroad programs, three-fourths enrolled 501 or more, and all schools offering 10 or more programs had more than 500 students.
The number of international study programs also seemed to be directly correlated with the size of the school’s annual expenditures. Almost the totality of schools with annual expenditures of under $10 million run between one and four programs a year, compared to 54 percent of schools with more than $20 million in annual expenditures running a similar number of programs.

**Countries Included**

While the primary destinations for school travels abroad still include European countries within the top five destinations, schools are also traveling more to less developed nations. Close to half of respondents cited Spain as one of the destinations for study abroad programs (48 percent). Other countries completing the list of the top five included France (46 percent), Italy (34 percent), China (29 percent), and Costa Rica (29 percent).

Additional destinations outside of the top 10 included South Africa, Dominican Republic, Guatemala, Japan, Argentina, Ecuador, Mexico, Ireland, and Nicaragua.

These findings reflect the different language programs offered at independent schools and denote that Spanish, Mandarin, and French continue to be popular options among students.

**Over the past three years, in which countries has your school offered a study abroad program?**

![Bar chart showing the percentage of schools offering study abroad programs to various countries.]

- Spain: 48%
- France: 46%
- Italy: 34%
- China: 29%
- Costa Rica: 29%
- UK: 19%
- Germany: 14%
- India: 13%
- Canada: 11%
- Peru: 11%
Length

The vast majority of schools (89 percent) have short-term international programs with an average length of less than 1 month. It is worth noting that some of these programs are volunteer/service trips, and/or trips taking place over school vacations that do not require much time.

What is the average length of the study abroad programs offered by your school?

<table>
<thead>
<tr>
<th>Length</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 1 month</td>
<td>89%</td>
</tr>
<tr>
<td>1-3 months</td>
<td>7%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>2%</td>
</tr>
<tr>
<td>6-12 months</td>
<td>2%</td>
</tr>
</tbody>
</table>

Budget

The vast majority of respondents reported that their schools have small budgets for international programs. A little over half of the schools (55 percent) have a total budget (excluding faculty and staff salaries) of less than $15,000, while 14 percent of them have a budget between $15,000 and $29,999.
What is the total budget (excluding faculty and staff salaries) for study abroad programming offered by your school?

[Pie chart showing budget distribution]

- 55%: Less than $15,000
- 14%: $15,000 to $29,999
- 10%: $30,000 to $59,999
- 6%: $60,000 to $99,999
- 15%: $100,000
Summit Insight

Summit participants generally agreed that international programs are usually launched with the objective of making them self-sustaining. These programs are designed to break even through the fees directly paid by families of participating students. However, having a budget for international programs achieves a number of different purposes. First, a budget provides the individual overseeing the programs with the ability to do site visits, hire additional help through partners or other staff, purchase any additional equipment (such as satellite phones), and provides a fund for any unanticipated costs that may occur during the trip. Second, a budget can provide financial aid for students who may not be able to otherwise participate in the experience. At least three of the participating summit schools noted that their programs are designed to ensure that financial obstacles do not keep students from participating in these opportunities. Finally, allocation in the budget for global programs is a tangible expression of the school’s commitment to global education. This last point was particularly important to schools with more robust programming as it underscores the importance of ensuring that substantial programs receive the support, financial and otherwise, that they need in order to be delivered effectively.
Management

When asked what approach the school uses to oversee and manage study abroad programs, schools were almost equally split among: centralized through a single function or academic department (34 percent), dispersed across multiple functions and/or academic departments (30 percent), and centralized for oversight purposes through a single function or academic department with multiple functions and/or academic departments responsible for managing each program offered (29 percent).

Other forms of management (7 percent) included through the school administration, individual faculty members, or staff in charge of the programs. In some instances, the school works with a travel agency, and in others, schools indicated that they do not directly sponsor all trips.

What approach does your school use to oversee and manage study abroad programs?

- Centralized through a single function or academic department: 34%
- Dispersed across multiple functions and/or academic departments: 30%
- Centralized for oversight purposes through a single function or academic department with multiple functions and/or academic departments responsible for managing each program offered: 29%
- Other: 7%
Summit Insight

Summit participants roundly agreed that centralized oversight is a preferable approach to global programming, either through an individual or a team. Oversight of international programs becomes difficult and inconsistent when it is decentralized among many different offices or divisions. One of the main protections that schools have against potential harm and resulting liability is establishing a system to manage risk through training, policies, procedures, releases, and other steps, and ensuring that this system is implemented consistently. Without centralized oversight, details slip through the cracks. Schools also lose the advantage of having an individual or consistent team. A centralized group understands all of the programs, their individual risks, and the steps that have been taken to manage those risks.
Approval of New Programs

More than seven in ten survey participants indicated that they have or require a formal approval process for newly proposed study abroad programs (73 percent). The most common elements included to evaluate the trip proposal include approved travel locations (93 percent), followed by the number of trip leaders required and their qualifications, and the full itinerary for the trip (84 percent in each case).

Which of the following are used to evaluate a trip proposal? Select all that apply.

- Approved travel locations: 93%
- Number of trip leaders required: 84%
- Full itinerary for the trip: 84%
- Maximum number of students who can enroll: 61%
- Requirements for third-party providers: 53%
- I don't know: 3%
- None of the above: 1%
Summit Insight

Hand in hand with a centralized trip oversight committee or individual is a formal process for trip approval. One summit participant noted that his school routinely takes at least 18 months to two years to evaluate a proposal and fully “vet” a proposed trip. Most of the summit schools have a formalized paper form and review process that reviews the proposals and either approves, disapproves, or proposes further research or information before approving the program. Many of the summit schools noted that the approval process helps the school’s leadership keep an eye on the extent of the risk in each trip and be more generally aware of how the school is operating abroad.
Participants in Study Abroad Programs

Number of Students

Among schools with study abroad programs, 67 percent have between one and 49 students participating in the program per year, while 7 percent of schools have 100 or more participants.

Schools offering fewer programs a year were more likely to have fewer students participating in these programs. For instance, 80 percent of schools with one to four programs a year reported fewer than 50 students taking part in the study abroad programs, while all of those schools with 10 or more programs a year included 50 students or more in those programs.

How many students participate in your school’s study abroad programs each year?

![Bar chart showing the distribution of students per year for study abroad programs.](chart.png)
Participation Requirements

Although 95 percent of respondents indicated that students at their schools were not required to participate in an international travel program to satisfy course or graduation requirements, there seem to be certain grade restrictions for participation.

Many schools (40 percent) require that students be at least in 9th grade to participate in a program. Another 14 percent of schools require students to be in 7th grade to take part in international programs. Very few schools (3 percent) allow students below 6th grade to participate.

What is the minimum grade level required for participation in your school’s study abroad programs?

Like colleges and universities, many schools (63 percent) use established criteria to select students to participate in study abroad programs. The majority of these schools (56 percent) have more than 500 students.
Does your school use established criteria to select students to participate in study abroad programs?

- Yes: 37%
- No: 63%
Many of the summit schools carefully evaluate the student applicants, even when a school trip is part of the student’s extracurricular activities, such as a choir tour or a trip for a sports team. Retaining discretion to determine which students may lack the appropriate maturity for a particular trip is important both as a general deterrent for students inclined to misbehave and to manage potential trip risks ahead of time. Several summit schools noted that certain school trips may not be appropriate for everyone due to the nature of the destination, cultural experiences, or potential safety issues. In cases where students who have displayed behavior issues in the past want to participate in such a trip, the global program director typically or often encourages the student to either wait until he or she is more mature or encourage the student to consider a different travel opportunity. Several schools noted that they require all students participating in trips to have statements from student advisors or other faculty providing an overview of the student’s behavior and a recommendation to allow the student to participate. At least one school requires an application, essays, a statement from the student’s mentor or advisor, and committee review. Finally, one school reported that students with outstanding financial obligations to the school cannot participate in any trips. Many of the schools agreed that if a trip leader did not feel comfortable taking a particular student, that leader had the option of denying that student’s admission to the trip.

Many summit schools have wrestled with screening students for allergies and potential disability access issues. While the schools themselves can accommodate students on campus and many U.S. trips, taking students to other countries where there is little to no control over food (particularly for students with peanut allergies) or where there is an outdated infrastructure presents very specific problems. Most schools have dealt with these issues as they arose, but schools should be aware of the potential for concerns in this area.
Forms Required

Almost every school (95 percent) requires parents of student participants to sign a release or waiver of liability. However, only 62 percent of schools required student participants to sign a form that acknowledges the risks associated with the program, or an assumption of risk form. This practice seems to be more common among very large schools. Forty-three percent of those schools requiring students to sign an assumption of risk form enroll more than 700 students.

Does your school require parents of student participants to sign a release or waiver of liability?

- Yes: 95%
- No: 5%

Are student participants required to sign an assumption of risk form or any other form that acknowledges the risks associated with the program?

- Yes: 38%
- No: 62%
**Summit Insight**

All summit schools require parents to sign liability waivers or releases, which are an important part of managing the risks of international travel. The person signing a liability waiver should first have a clear understanding of the potential risks of the trip. Many summit schools were concerned about ensuring that parents or guardian have a sufficient understanding of the risks. Accordingly, several schools required parents or guardians to attend an information session that covered risks for students before providing the releases to sign. Because of general concern about whether parents who couldn’t attend these sessions had the necessary understanding of risk before signing releases, many schools made follow-up calls or found other ways to contact parents directly. Summit schools roundly agreed that even if state law did not favor enforcing liability waivers against parents waiving their right to make claims, having the parent session and the signed document can still help the school in a later lawsuit.

Most of the summit schools also required students to participate in orientation programs, sometimes multiple sessions, that discussed the various risks and issues related to the trip, and required students to sign an agreement to comply with a code of conduct. These orientation sessions and the related forms serve to make certain that the students themselves are aware of the risks and responsibilities associated with the trip.
Pre-Trip Preparation

Trip Leader Selection

Only 56 percent of schools have a formal process to approve or select faculty, staff, parents, or volunteers as trip leaders. However, 80 percent of schools use background checks to approve or select trip leaders.

Summit Insight

Summit schools generally agreed that there should be a formal process for selecting and approving faculty, staff, parents, and volunteers for trips. A couple of schools noted that new staffers are not able to lead trips until they have been with the school for a period of time. One school that offers longer trips to more impoverished countries noted that it is extremely selective about teachers chaperoning trips. This school and a couple of other summit schools that embark on fairly complex trips noted that while the teachers are the content experts, many do not have any background or training in leading a trip of students to particularly challenging areas. For this reason, the schools typically recruit outside leaders with wilderness or other trip expertise to ensure that the skillset needed for the trip is present. Several summit schools noted that they were moving away from volunteers or unpaid chaperones to ensure that those overseeing the trip feel that their duties are part of their “job” rather than an optional choice.
Trip Leader-to-Student Ratio

Twenty-two percent of schools responding to the survey require an average 1:6 trip leader-to-student ratio for study abroad programs, followed closely by 20 percent of schools with a 1:5 trip leader-to-student ratio.

What is the average trip leader-to-student ratio required for your school’s study abroad programs?

![Bar chart showing percentage of schools requiring different trip leader-to-student ratios.]

**Summit Insight**

Several summit schools noted the importance of having a sufficient number of adults on the trip to be able to have a “spare” adult to go with students to hospitals, home, or other potential deviations from the trip schedules. Unexpected things have happened on many school trips and a low adult-to-student ratio allows chaperones flexibility in the event that an adult must be on hand to handle an emergency involving one or more students.
**Trip Leader Training**

Trip leaders generally receive training in application of school code of conduct and other policies during the study abroad program (86 percent), appropriate behavior and boundaries between leaders and student participants (85 percent), and procedures to use in the event of a crisis (81 percent). Moreover, 74 percent of respondents indicated that trip leaders in their programs receive training in all three areas.

**Do trip leaders receive training before the start of the program on the following?**

<table>
<thead>
<tr>
<th>Training Area</th>
<th>Yes (%)</th>
<th>No (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procedures to use in the event of a crisis</td>
<td>81%</td>
<td>19%</td>
</tr>
<tr>
<td>Appropriate behavior and boundaries between leaders and student participants</td>
<td>85%</td>
<td>16%</td>
</tr>
<tr>
<td>Application of school code of conduct and other policies during study abroad program</td>
<td>86%</td>
<td>14%</td>
</tr>
</tbody>
</table>
Pre-Trip Orientation

Schools are also very likely (89 percent) to conduct a pre-trip orientation for each study abroad program. The orientation must be attended by student participants (95 percent), trip leaders (94 percent), and parents of student participants (78 percent).

Who is required to attend pre-trip orientation sessions? Select all that apply.

The top three topics emphasized the pre-trip orientation are: student conduct and discipline (92 percent), respect of other cultures (83 percent), and risks associated with program location or activities (78 percent).
Which of the following topics are addressed during the pre-trip orientation? Select all that apply.

- Student conduct and discipline: 92%
- Respect of other cultures: 83%
- Risks associated with program location or activities: 78%
- Health and other insurance required for participants: 74%
- Emergency or crisis response: 70%
- Important campus contacts: 65%
- Insurance that the school has purchased to cover the program: 52%
- I don't know: 8%
**Summit Insight**

All summit schools have orientation for students, parents, and trip leaders, and many held specific orientation trainings addressing potential issues that may arise on the trip. The extent of these orientations varies depending on the type of trip. All schools felt that these programs helped prepare everyone involved for both the overall trip and any potential emergency and communication issues that may arise. Several summit schools also make recommendations to parents regarding physicians or hospitals that have a background in international medicine and travel to ensure that trip participants have the appropriate inoculations and any needed medications for the trip. However, summit participants caution schools not to require parents to use a specific physician or hospital; rather, schools should be clear that parents have the freedom to choose any physician or hospital with appropriate expertise.
Types of Insurance

Respondents usually purchase general liability (69 percent), health and medical assist (62 percent), and evacuation and repatriation (56 percent) insurance for their programs.

What type of insurance does the school purchase for study abroad programs? Select all that apply.

![Bar chart showing percentages of different types of insurance purchased: General liability 69%, Health and medical assist 62%, Evacuation and repatriation 56%, Accidental death and dismemberment 44%, Kidnap and ransom 30%, Auto liability 17%, Other 14%.]
**Summit Insight**

Many summit schools generally agreed that requiring the students to have international health insurance was extremely helpful when overseas. Further, at least one school had trip leaders and U.S. school emergency contacts call the insurance companies that cover the international trips to do emergency simulation drills so that the trip leaders and school contacts were familiar with the insurance company and how their systems work. One school strongly recommended working with the school’s insurance broker or insurance company to ensure that the wide variety of scenarios that can occur during a trip abroad, particularly to potentially more dangerous countries, are appropriately covered under the school’s policies or additional health policies.
Third-Party Vendors

Some schools (64 percent) offer study abroad programs that are conducted by third-party vendors. Among those schools working with third-party vendors, 69 percent enter into written contracts with those vendors.

The top three elements covered under those contracts are: Proof of third-party insurance coverage (59 percent), insurance requirements (56 percent), and emergency and crisis management protocols (51 percent).

Which of the following are included in contracts with vendors? Select all that apply.

- Proof of third-party insurance coverage: 59%
- Insurance requirements: 56%
- Emergency and crisis management protocols: 51%
- Indemnification of the school: 47%
- Travel assistance services for trip participants: 46%
- Orientation and onsite services for students: 43%
- I don't know: 36%
- None of the above: 1%
Summit Insight

Of the topics covered during the summit, the results from the chart on the previous page gave summit schools the most pause. The summit schools that entered into agreements with third-party vendors had many ways to ensure that services and expectations were researched and well documented. One school noted that many vendors will let a representative from the school go on another trip to get a feeling for how the company runs its trips. Beyond the proof of insurance, a contract including an indemnification provision – which states that if something happens to a student due to the actions of the vendor, the vendor will also defend the school if it is sued for the incident – one school noted that it requires a comprehensive written itinerary for every step of the trip, including types of transportation, emergency scenarios and resources, and anything unusual about the trip itself. Virtually all summit schools that use third-party vendors had some form of vetting process, such as through references or safety checks via qualified third parties. Schools also noted that they put out requests for proposals to ensure that they were receiving a good array of options.
Crisis Management Plan

Surprisingly, only 52 percent of schools have a crisis management plan (including an evacuation plan and a plan to communicate with parents) for each study abroad program. Of those schools with a plan, 61 percent were large schools with more than 500 students.

Does the school have a crisis management plan (including an evacuation plan and a plan to communicate with parents) for each study abroad program?
Summit Insight

The summit schools all agreed that emergency planning needs to be part of any trip. The specific steps summit schools take were varied, but their suggestions include:

- Doing emergency and crisis planning instruction for school leaders, trip leaders, students, and parents so that all of the participants understand their roles and what may be needed in a crisis on the particular trip. These trainings may be provided by a third party in some cases, but many include scenarios, reworking of actual events, and team building so that the groups traveling together have experience working together. The extent and the intensity of the training vary depending on the type of trip and the conditions anticipated.

- Briefing students before the trip and at various stops along the way about basic emergency procedures generally and for that particular overnight stay. Several summit schools took a few minutes every morning to point out particular risk management concerns for that day and to inform or remind the students of what to do in the event of an emergency.

- Having phone policies. Many schools that allow students to bring cell phones require all students to add every trip participant’s phone number as well as school emergency contact information. The trip leaders have international calling plans and, in some cases, satellite phones.

- Building phone chains. All of the schools had some form of phone chain so that the trip leaders had more than one person to contact back at the school if something went wrong.

- Implementing parent communications plans. The schools also had a plan for communicating with parents, and parents were informed about this plan at orientation.

- Knowing where the resources are during every part of the trip. Identifying in advance resources such as hospitals, police stations, and embassies and having these resources as part of the trip leaders’ crisis notebook.

- Ensuring that trip leaders have a complete notebook and guide on various crisis situations. This information should include the various trip specific risks and resources, all key school information, insurance information, student forms and health information, and other protocols. One school used the Michigan State manual as a basis for their own guide, and all trip leaders are required to travel with it. Here are the Michigan State resources:
  
  [http://studyabroad.isp.msu.edu/people/faculty/health_safety_security/general_principles.html](http://studyabroad.isp.msu.edu/people/faculty/health_safety_security/general_principles.html).
Conducting Study Abroad Programs

Onsite Orientation

Nearly six in ten survey participants (57 percent) indicated that they conduct an onsite orientation once students arrive at the study abroad location.

This onsite orientation commonly addresses topics such as: local laws, customs, cultural practices, and beliefs (83 percent), emergency contacts (78 percent), and risks associated with program location (68 percent).

What topics are addressed in onsite orientation programs? Select all that apply.
Housing

Schools most often house students in hotels (81 percent) or with host families (77 percent). Only 21 percent of schools use hostels.

What types of housing are provided to participants during the programs? Select all that apply.

- 81% Hotels
- 77% Host families
- 31% Student housing at foreign schools
- 21% Hostels
- 5% Other

Host Families and Foreign National Staff

Only 23 percent of respondents answered affirmatively when asked if their schools vet host families and foreign national staff members who have direct and unsupervised contact with students participating in international programs.
Does your school vet host families and foreign national staff members who have direct and unsupervised contact with students participating in study abroad programs?

**Background Checks**

Only 28 percent of the schools that vet and approve host families and foreign national staff members use background checks to do so. One of the reasons for this low response may be the difficulty and cost associated with conducting international background checks.

Are background checks used to approve or select host families and foreign national staff members?
Summit Insight

Summit schools agreed that vetting host families is particularly complicated. Background checks are culturally abhorrent in many countries, often implying a lack of trust in the family or that they are criminals. The summit schools had many ways of addressing the general risk concerns. One school has the program coordinator spend the night with one or more host families when reviewing the location generally, and visit all of the host families while doing the site visit. Another school collects specific references for host families from the local partner school or other partner organization (NGO). For longer stays, several of the summit schools have made it a practice to visit the students in their host homes during their stay and check in with them regularly. All of the schools that use host families agreed that some form of list of requirements or statement of understanding about the duties of a host family can help ensure that the host family understands the school’s expectations. Although such a document may not be a fully enforceable agreement, it can help show that the school took steps to protect its students’ welfare.

The summit schools generally agreed that host families present challenges, but also incredible benefits through immersing students in the local culture and language. One of the summit schools strongly encouraged those using host families to look closely at why that particular kind of housing is appropriate for a particular trip, and weigh the benefits against the potential risks. Others noted that there are cultural issues, too, with using host families. Some school programs allow only one student to a host family, largely to ensure that the students have the full cultural experience, but in some countries it would be considered bizarre to place a single student, particularly if she is female, alone in a family.

Finally, parents and guardians sending students to stay with host families should recognize that background checks and other information that are standard in the United States are not necessarily so abroad. Schools should explain to parents and guardians both the steps they take and the limitations. Further, students should be cognizant of the cultural issues and expectations when staying with host families and know to reach out for support from the school and local contacts if necessary.
Local Vendor Vetting

Only 42 percent of schools that rely on local vendors or service providers, such as a private transportation company, vet those vendors.

When vetting is conducted, it includes elements such as the provider’s reputation (81 percent), quality of services (75 percent), and safety records (58 percent).

What elements are included in your vetting process? Select all that apply.

![Bar chart showing percentages of elements included in vetting process]

Student Post-Trip Survey

When the program is over, only 37 percent of schools conduct a post-trip survey of participating students.

Among the schools that do conduct a survey, common questions include overall impressions of the program (84 percent), effectiveness of pre-trip and/or onsite orientation(s) (68 percent), and effectiveness and preparation of program trip leaders (64 percent).
What topics are addressed in the students’ post-trip survey?

- Overall impressions of the program: 84%
- Effectiveness of pre-trip and/or onsite orientation(s): 68%
- Effectiveness and preparation of program trip leaders: 64%
- Problems experienced on the trip related to safety: 52%
- Problems experienced on the trip related to health: 50%
- Other: 5%
**Summit Insight**

Most of the summit schools did post-trip surveys. Particularly for longer trips and experiences, the surveys sought to find out participation objectives, offer self-evaluations, and seek other feedback. Some of the schools do these evaluations as written or online surveys, while others do more casual group or one-on-one interviews. These interviews were good opportunities to discuss issues or concerns that might have arisen during the trip. At least one summit school also surveyed parents after the students returned to get feedback from the parents on the value of the trip and how they felt the trip was handled overall.
Trip Leader Post-Trip Report

Respondents were more likely (46 percent) to ask trip leaders to complete a post-trip report. Trip leaders are questioned on topics such as information about the location to be considered for future trips (29 percent), effectiveness of pre-trip planning and orientation (17 percent), and evaluation of services provided by vendors and contractors (17 percent). Twenty-three percent of participants included all three topics.

What topics are addressed in the trip leaders’ post-trip report? Select all that apply.
**Summit Insight**

Most of the summit schools required post-trip reports from trip leaders. The method for reporting out varied from school to school. Some of these were staged in written format, while others engaged in group discussions and in one-on-one discussions with the global program coordinator. These reports also served as chances to walk through any crisis issues and determine lessons learned from the trips. Summit schools discussed how important this trip follow-up and evaluation are, particularly as they relate to ensuring that those responsible for these trips understand the professional expectations of overseeing such an excursion. Some summit schools noted that a final report and evaluation of a trip could become part of the employee file.
Conclusions

Main Concerns About Study Abroad Programs

The top issues that concern schools include safety (35 percent), risk management (16 percent), crisis management (10 percent), and cost of the study abroad programs (10 percent).

What elements of study abroad programs concern you the most?

<table>
<thead>
<tr>
<th>Concerns</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety</td>
<td>35%</td>
</tr>
<tr>
<td>Risk management</td>
<td>16%</td>
</tr>
<tr>
<td>Crisis management</td>
<td>10%</td>
</tr>
<tr>
<td>Cost and affordability</td>
<td>10%</td>
</tr>
<tr>
<td>Liability</td>
<td>9%</td>
</tr>
<tr>
<td>Health of students and staff</td>
<td>7%</td>
</tr>
<tr>
<td>Staff training</td>
<td>5%</td>
</tr>
<tr>
<td>Language barrier and communication</td>
<td>3%</td>
</tr>
<tr>
<td>Transportation</td>
<td>3%</td>
</tr>
</tbody>
</table>
Resources Needed by Schools

Survey participants suggested schools needed resources related to guidelines and best practices to mitigate risk associated with running a study abroad program, as well as ways to enhance the safety of participants and staff.

What resources can UE and NAIS provide to help ensure that your school’s study abroad programs are safe and well-managed?

- Offer simple insurance policies for short-term programs and best practice guidelines to protect school from liability damages.
- Recommending third-party vendors that have been vetted.
- Training for trip leaders and provide other schools’ published materials on program experiences.
- Provide and outline and table of contents for comprehensive school safety manual.
- Greater resources with embassies and others regarding emergency and evacuation planning.
- A formal checklist of items/issues to be considered before approving a trip.
- Need-based grants for students to participate in these programs.
- Provide resources for researching the safety of certain trips and service providers.
- Establish recommended standards and guidelines for risk/crisis management.
School Demographics

Enrollment

Over half of the survey respondents (57 percent) were fairly large schools with more than 500 students. Only 7 percent of participant schools have fewer than 201 students.

How many students are enrolled at your school?

<table>
<thead>
<tr>
<th>Enrollment Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 201</td>
<td>7%</td>
</tr>
<tr>
<td>201-300</td>
<td>13%</td>
</tr>
<tr>
<td>301-500</td>
<td>24%</td>
</tr>
<tr>
<td>501-700</td>
<td>19%</td>
</tr>
<tr>
<td>More than 700</td>
<td>38%</td>
</tr>
</tbody>
</table>
Type

Most of the survey participants were from day schools (76 percent) and only 5 percent were from day-boarding schools.

Which of the following best describes your school?
Annual Expenditures

Thirty-five percent of respondents have an annual expenditure of more than $20 million, while only 10 percent have less than $5 million.

What are your school’s annual expenditures?