Chapter 7

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Introduction

Organizations conduct business in an increasingly globally interconnected economic and business environment. International trade continues to grow at a rate of roughly 5% per year (World Trade Organization 2013). Organizations will continue to grapple with selecting and deploying competent global consultants and managers to meet business needs related to this additional global reach. In fact, each year since 1999, an average of 48% of business leaders report an increase in international expatriate assignments (Brookfield Global Relocation Services 2011). Yet 10–50% of expatriates fail to meet the requirements of their assignment (Eschbach et al. 2001).

Business leaders view academia as responsible for training competent global leaders (e.g., Webb et al. 1994). It is important that degree programs in industrial–organizational (I/O) psychology, organizational behavior (OB), and other business-related fields prepare students for success in this environment. Fortunately, researchers have demonstrated the link between the success of global business leaders and global business competence (Gupta and Govindarajan 2002; Mintzberg and Gosling 2002). While international education is a positive trend, it appears that it may not be progressing quickly enough to meet the career demands of graduating students. Unfortunately, less than a third of business leaders felt that academic programs were graduating students with the necessary skills to effectively fill entry-level international positions (Webb et al. 1994).

In this chapter, we discuss important nuances of establishing effective international exchange programs in higher education. The first portion of the chapter

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focuses on the purpose of an exchange program, as well as the beneficiaries—faculty, students, and institutions. In the current globally interconnected business environment, the value of an international exchange program can be great. Students majoring in business, I/O psychology, and related fields benefit immensely from training that emphasizes an international context. The merit of utilizing an exchange program to develop the necessary international acumen is explicated in the first section of this chapter.

The second section focuses on the specifics of establishing a program, detailing the need for leadership support from the university down to the department level, the importance of clearly specified goals and strategy, potential sources of funding, the benefit of student preparation and repatriation activities, as well as the assessment of program impact. Finally, this section concludes with practical advice based on lessons learned by exchange program leaders along the way.

**Exchange Programs: Types and Definitions**

International study curricula vary in terms of the structure, in terms of the content delivered, and in the duration of participation. Structurally, programs vary widely, from virtual teamwork with a brief in-person interaction up to full long-term rotating exchange agreements. The content of the program may vary across discipline, psychology versus business, and within discipline, industrial versus organizational psychology. The emphasis of this chapter will be on business-related programs. Finally, the duration of exchange can vary from several days to full academic years. Several examples of programs displaying the range of each aspect are described below.

While all types of programs are essentially experiential in nature, requiring at least some degree of engagement with the cultural context of the host college or university, the specific instructional design of an exchange program should vary depending on goals and resources. Additionally, an international curriculum involving international institutional collaboration may vary widely, from virtual collaboration to actual physical relocation. These curricula may include, for example, a consulting model, such as the one that the University of California, Berkeley utilizes, wherein the Haas MBA students work in teams in a consulting capacity serving organizations around the world. A multicultural team consulting model may be used, such as the University of Minnesota’s Carson School of Management, wherein MBA students and faculty work with international partners on live business cases and challenges for corporations. Utilizing a student-driven model, Northwestern University’s Kellogg MBA students engage in the planning and execution of a 10-week course on a particular country and area of focus. In a multi-school collaboration model, 13 US Center for International Business and Educational Research (CIBER) host schools and their respective international partners bring students together for a virtual project lasting 7 weeks. Finally, using the exchange model, the University of South Carolina’s Moore School partners with the Chinese University of Hong Kong, offering an International Business and Chinese Enterprise degree, which involves alternating studying at each institution and doing a separate internship in each country (D’Angelo 2011 and received from abroad.

International exchange higher education, with 27 year) studying abroad for and a 5.7% increase in institutions. Of those students, most (54.6%) chose while the majority of the end of the year, IIE 2011). 

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ning and execution of a 10-week s. In a multi-school collaboration from Educational Research (CIBER) partners bring students together for exchange model, the University the Chinese University of Hong kinese Enterprise degree, which ind doing a separate internship in each country (D’Angelo 2012). The exchange program, wherein students are sent and received from abroad, is the primary focus of this chapter.

International exchange programs are increasingly prevalent in institutions of higher education, with 270,604 US students (a 3.9% increase from the previous year) studying abroad for academic credit during the 2009–2010 academic year and a 5.7% increase in international student enrollment in US institutions from 2010 to 2011. Of those students studying abroad during the 2008–2009 academic year, most (54.6%) chose a short-term program (i.e., summer or 8 weeks or less), while the majority of the rest chose a mid-length program (one or two quarters or one semester), and few (4.3%) selected a long-term program (i.e., academic or calendar year; IIE 2011). While international education has historically been seen as an activity pursued largely by humanities students, such as those students studying language, archeology, history, and related fields, there has been a recent boost of interest among business and business-related students. The field of study chosen by international students is most frequently business and management (21.5%; IIE 2011), indicating the importance of a global education for those individuals pursuing a degree in an increasingly international field.

The Benefits of Exchange Programs

Purpose of International Exchange: Developing Intercultural Competence

There is extensive evidence for the educational benefit of a more diverse student population. In short, more diverse classrooms and campuses result in more innovative and higher quality decisions in student work groups (McLeod et al. 1996), a higher degree of critical analysis by way of multiple diverse viewpoints (Antonio et al. 2004; Nemeth 1985, 1986, 1995; Schulz-Hardt et al. 2006; Sommers 2006), as well as greater cognitive development, satisfaction, and improved leadership abilities (Astin 1993a, b).

These findings are the results of decades of empirical research on the topic. Ideas generated during classroom brainstorming sessions are rated higher in terms of feasibility and effectiveness when the brainstorming groups were more ethnically diverse (McLeod et al. 1996). Depth of critical analysis of decisions and alternatives is higher in groups exposed to a diversity of viewpoints, wherein ethnic and cultural diversities stimulated multiple perspectives and previously unconsidered alternatives (Antonio et al. 2004; Nemeth 1985, 1986, 1995; Schulz-Hardt et al. 2006; Sommers 2006). The findings of benefits related to group diversity are paralleled in organizations, where the most innovative companies have been found to be those deliberately establishing diverse work teams (Kanter 1983). One large longitudinal study found that universities with institutional policies designed to foster campus diversity have a positive effect on student cognitive development, satisfaction, and leadership abilities (Astin 1993a, b). Another longitudinal study suggested that formal and informal interactions with racially and ethnically diverse
peers in the university setting resulted in higher levels of engagement, motivation, and intellectual and academic skills (Gurin et al. 2002). Finally, in- and out-of-class interactions with more diverse peers are positively related to critical thinking practices (Pascarella et al. 1996). It appears that there are numerous educational benefits associated with a diverse classroom and campus in and of itself. Moreover, recent research has also pointed to specific competencies associated with success in the international business arena, and empirical evidence suggests that international exchange programs can aid the development of these competencies.

The definition of global or international competence varies with the particular domain in which it is being used. For instance, the components of global competence are likely to differ substantively between an expatriate training and a political diplomat (Hunter et al. 2006). However, two broadly applicable and relatively nascent constructs that are becoming increasingly popular in business settings are Global Mindset and Cross-Cultural Intelligence.

A Global Mindset, for instance, is an oft-mentioned competency in cross-cultural training seminars but not consistently defined. However, a recent psychometric research has led to a more clear definition and evidence of construct validity (Javidan et al. 2010, 2012), with subsequent research showing promising results for the impact of international experience on the development of one's global mindset competencies. Another collaborative attempt has been made to integrate research toward a general set of cognitive-based competencies associated with one's skillful adaptation and performance in a new cultural setting. This line of research has offered a construct-labeled "Cultural Intelligence" (CQ). Research (e.g., Group and Organization Management, 2006, Vol. 31-1) offers support for the notion that CQ can be assessed and developed among individuals.

Providing a curriculum with an international emphasis, particularly one that allows opportunities for experiential cross-cultural learning, is critical to the development of Intercultural Competence. Two related competencies popularized in the business setting include Global Mindset and CQ. These two constructs are briefly described below.

In lay terms, the tripartite model often associated with cultural competence includes the individual's mind (cognitive), body (behavior), and heart (emotional or motivational). A fourth facet of competence has since been added as well, a meta-ability or strategic cultural competence (see Earley et al. 2006; Earley and Mosakowski 2005 for overview).

The cognitive or knowledge-based component of cultural quotient refers, in general, to an awareness of one's surroundings, the customs, norms, and behaviors, as well as the possession of other information related to a particular culture or cultures and the differences that exist between cultures. Cultural knowledge includes the specific norms, values, practices, beliefs, and conventions of a group or groups of people. The behavioral component, or body, involves one's adeptness at identifying both verbal and nonverbal communication norms and modifying one's own behavior accordingly. The competency includes the ability to mimic the behaviors, mannersisms, and other body language cues of others. The behavioral facet of cultural competence is the action-oriented aspect of the construct. The motivational, or emotional (heart), facet of CQ involves the belief in one's own ability and the incli-
nation and willingness to adapt. In general, it could be thought of as cultural interest and efficacy (Earley and Ang 2003; Ng and Earley 2006). Finally, a fourth component recently advanced includes the metacognitive cultural quotient, or cultural cognitive strategy. This construct refers to a self-awareness and self-monitoring ability as it relates to cross-cultural interaction. (Earley and Ang 2003).

While CQ is a relatively new construct identified by researchers, the initial empirical evidence for its practical application is promising. Higher levels of CQ appear to be related to important individual work performance outcomes, such as judgment and decision making, cultural adaptation, and task performance (e.g., Ang et al. 2007). While previous studies have examined important outcomes of CQ, possible antecedents have received less investigation. Initial evidence for the impact of global education on these four cultural competencies is promising. One of the first peer-reviewed studies of the antecedents of CQ (Crowne 2008) offers empirical support for the impact of global experiential training (e.g., exchange programs) on these constructs. This study provides some insight regarding the impact of cultural exposure on CQ, as well as a perspective on how the depth of cultural exposure influences a person's CQ. Study findings indicate that certain types of exposures to other cultures from these experiences increase CQ. Specifically, education abroad relates to increases in each facet of CQ, versus less impactful experiences, such as being employed abroad, living abroad, or education level (Crowne 2008). These findings are of relevance not only for multinational firms as they hire, promote, train, and prepare employees for international assignments but also for educational institutions trying to enable students with the basic skill set to fill entry-level global roles.

Finally, regarding the importance of developing a Global Mindset, when sending expatriates overseas for leadership positions, contributors (Javidan et al. 2010) to the GLOBE studies, collected data from more than 5,000 expatriate leaders and found that the successful ones had three sets of characteristics, including "Intellectual," "Psychological," and "Interpersonal Capital." Intellectual Capital, for example, knowledge of global industries, an understanding of complex global issues, and cultural acumen. Psychological Capital includes a penchant for exploring other parts of the world, experiencing other cultures, and trying new ways of doing things, as well as resiliency, curiosity, and confidence. Finally, Interpersonal Capital involves the ability to engage and connect emotionally with people from other parts of the world. These same researchers have found that while each of these types of Capital predicts success overseas, Intellectual Capital is particularly amenable to development via classroom instruction. Therefore, it may be beneficial to emphasize the development of Psychological Capital and Interpersonal Capital via interaction with visiting exchange students, cultural events, and the study abroad experiences.

Institutions of higher education have adapted to the requirements of the global business arena and many have internationalized their curriculum to develop competencies related to Intercultural Competence (see Deardorff and Jones 2012 for review)—an umbrella term that has been used to refer to cross-cultural ability, skills, attitudes, and behaviors that happen to be quite similar conceptually to CQ and Global Mindset. The use of internationalized curricula to develop Intercultural Competence or Competencies is supported by empirical findings.
Study abroad programs have been shown to be particularly effective at enhancing Intercultural Competencies. Research suggests, for example, that participation in study abroad programs is less ethnocentric (Saghaei 2001), has more positive attitudes toward diversity (Douglas and Jones-Rikkers 2001; Wang et al. 2009), and is more confident and independent (Black and Duhon 2006), and reports greater career advancement (Marcotte et al. 2007). These benefits are numerous and are found in international experiences of varying lengths and types.

Study abroad programs, wherein students participate in education at a campus within a different national boundary, not only significantly increase inclusive and accepting cross-national attitudes but also host countries more that are more culturally dissimilar with one’s own (as defined by Hofstede’s cultural dimensions) appear to result in even greater increases in inclusive and accepting attitudes (Douglas and Jones-Rikkers 2001). Likewise, study abroad programs have been shown to have a significant positive effect on level of tolerance, cultural empathy, self-confidence, and independence (Black and Duhon 2006). Similarly, at the graduate level short-term study abroad experiences have been shown to improve confidence and expertise (Hallows et al. 2011).

Length, frequency, and type of international experience appear to influence competencies as well. Students who have previously traveled internationally, traveled internationally more frequently, and visited more countries scored higher initially on self-reported flexibility and openness, emotional resilience, personal autonomy, and perceptual acuity (Shaftel et al. 2007). Students studying abroad for as little as 2 weeks displayed significant increases in self-reported flexibility and openness, emotional resilience, personal autonomy, and perceptual acuity related to interpersonal interaction and communication (Kitsantis and Meyers 2001). In programs as short as 2 weeks, students developed more favorable attitudes toward diversity in terms of openness to beliefs, values, perspectives, and demographics different from their own (Wang et al. 2009). Improvements in Intercultural Competence do, however, vary by duration of program, with lengthier courses resulting in higher levels of flexibility and openness, emotional resilience, personal autonomy, and perceptual acuity (Shaftel et al. 2007). This is not to discount the impact of short-term study abroad programs. In fact, the most dramatic increase in Intercultural Competencies appears to be in the first several weeks of the program and then increases continue more gradually for the remainder (Kelley and Meyers 1992; Kitsantis and Meyers 2001; Shaftel et al. 2007). Finally, mobility programs are broader in scope than study abroad programs and include student exchanges, study abroad agreements, and internships in foreign countries that have — in addition to increased self-reported individual development and cultural awareness — shown improved career advancement (Marcotte et al. 2007). The benefits of an international exchange program are numerous. By way of campus diversity and cross-cultural interactions, students stand to gain from multiple diverse perspectives, which appears to have many associated benefits, such as a higher degree of critical thought and analysis, higher satisfaction with the college experience, better cognitive development, and more developed leadership abilities. Likewise, it appears that international exchange programs can offer the potential of enhancing Intercultural Competence. This competence, or com- petencies, is closely related to as descriptive of effective inter and a Global Mindset. Given th section of this chapter outlines t

The Process of Establishing

Establishing and managing an agreement of support and resources at recommendations have been coming from the 2008 National As on Institutional Management & presidents, senior administrator Council on Education (ACE) et al. 2008), a thorough review exchange program, exemplar in rankings, as well as brief case studies. These recommenda institutional commitment, (4) clarity and accountability, (5) triation (see Appendix for a che

Institutional Commitment

Successful institutions establish a logical process, implement it ensure that the exchange program is integrated into the institution, as well as implement institutional oversight (NAFSA). Ensuring the success of an institution is to ensure that the program is embedded within the student learning plan, for example, includes and exchange programs in participating institutions should be the education. The president’s strategy within 2 years of implementing students in the freshmen class increases in global education is also an important p of Minnesota, resulting in a str nationalization the University of mium visiting international stud
ticularly effective at enhancing, for example, that participation of females 2001; Wang et al. 2009, n 2006), and reports greater self-estems are numerous and are types. in education at a campus ounty increase inclusive and gies more that are more cul- stede's cultural dimensions) and accepting attitudes (Dow- programs have been shown more, cultural empathy, self-). Similarly, at the graduate tone to improve confidence appearance to influence com- ted internationally, traveled ntries scored higher initially silence, personal autonomy, dying abroad for as little as 3 exhibility and openness, emo- ility related to interpersonal 2001). In programs as short es toward diversity in terms graphics different from their il Competence do, however, resulting in higher levels of il autonomy, and perceptual : impact of short-term study t Intercultural Competencies and then increases continue 1992; Kitsaltis and Meyers broader in scope than study abroad agreements, and increased self-reported improved career advancement exchange programs are nu- interactions, students sand ers to have many associated d analysis, higher satisfacr and more developed nal exchange programs can e. This competence, or com- etencies, is closely related to CQ and Global Mindset, which are increasingly seen as descriptive of effective international managers, consultants, and expatriates CQ and a Global Mindset. Given the importance of an international curriculum, the next section of this chapter outlines guidance on how to establish an effective program.

The Process of Establishing an Exchange Program

Establishing and managing an international exchange program requires a large degree of support and resources across multiple levels of the institution. The following recommendations have been culled from a variety of authoritative sources, drawing from the 2008 National Association of Student Advisers (NAFSA) Task Force on Institutional Management of Study Abroad (a report intended for university presidents, senior administrators, and professionals; NAFSA 2008), the American Council on Education (ACE) report on International Partnerships (Van de Water et al. 2008), a thorough review of scholarly literature on the topic of international exchange program, exemplar institutions as pointed out by various publications and rankings, as well as brief case examples to provide additional clarity on a particular topic. These recommendations are grouped into the following categories: (1) institutional commitment, (2) study abroad infrastructure, (3) adequate resources, (4) clarity and accountability, (5) student preparation, and finally, (6) student repatriation (see Appendix for a checklist).

Institutional Commitment

Successful institutions establish and embed study abroad as a key element of the educational process, implement financially sustainable plans to support study abroad, ensure that the exchange program is an integral part of academic life at the particular institution, as well as implement the necessary systems and processes to provide institutional oversight (NAFSA 2008).

Ensuring the success of an international exchange program often means making sure that the program is embedded in the institution's strategy and mission (Van de Water et al. 2008). Many successful exchange programs exist in schools in which global education is part of the university mission. Boston University's 2007 strategic plan, for example, includes an emphasis on international education in general, and exchange programs in particular, emphasizing that the landscape in which students are learning should be thought of as beyond Boston—encompassing a global education. The president's strategic plan for a globalized student body has paid off, within 2 years of implementing the strategic plan the percentage of international students in the freshmen class increased from 7 to 11% (NAFSA 2009). International education is also an important part of mission statement endorsed by the University of Minnesota, resulting in a strong exchange program. As part of its agenda to internationalize the University of Minnesota campus, administrators reduced the premium visiting international students paid by almost two-thirds. The campus quickly
increased the number of visiting international students to 3% (up from 1%) on the way to the strategic goal of 5% (NAFSA 2009). These examples suggest that successful programs are often those that exist in institutions where global education is part of the organizational strategy and supported by the administration.

A program supported by the institution’s mission is a good starting place to ensure adequate resources, the foremost of which is often financial. During strategic planning, sources of adequate funding should be established. While there is no single best source of funding for all schools, there are some that are fairly common. These sources include tuition, in-kind exchange agreements in the form of incentives designed to alleviate exchange students from the burden of tuition, fundraising, and grants. Short-term financial plans can prove to be unsustainable; therefore, a source of financial backing that is likely to be continually available is important.

Next, integrating exchange programs into the life of the institution goes beyond gaining top administration and financial support. Internationalization should be a part of the integrated curriculum; moreover, it should be part of typical coursework. This curriculum may involve establishing the expectation that students will participate in at least one short-term study abroad experience, or it may go so far as to include a semester abroad as part of graduation requirements. Whether it is simply an institutional expectation or an actual graduation requirement, successful exchange programs should be facilitated by removing as many institutional barriers as possible and increasing motivating factors.

A final important factor regarding institutional support involves devoting a clear administrative mechanism, which is most often in the form of a study abroad office that provides oversight, governance, legal, financial, and academic planning. Managing the exchange process, relationships, and administrative details is time and resource intensive and requires a devoted work team at the least for a sustainable program.

**Study Abroad Infrastructure**

A structured approach to planning for course approval and credit transfer should be in place, and policies should be in place to guide credit transfer. Exchange program options should be updated in response to academic opportunity and student need. Systems should be established to manage the health and safety of students abroad as well as manage institutional risk, and finally, results of regular program evaluation should be used for continuous program improvement (NAFSA 2008).

The procedure for selecting exchange courses that will be advertised to exchange partners, as well as those that expatriated students will be given credit for taking, should be based on data such as site visits, student feedback, documentation and accreditation, if possible, and past experience with the partner institution. However, it is the commitment on the part of faculty to courses that are taught on their own campus as well as those courses they supervise as on-site director or temporary administrator that is critically important to the sustainability of the program. If the faculty lack commitment to the goals or belief in the merit of the exchange program, then a successful and sustainable model will be somewhat voluntary. Therefore, while sometimes subsidized, faculty involvement is important.

Both student and institutional support and educational environment should continually change to assessing and responding to needs before implementation. Annually, meeting this program require process. It is important for faculty exchange partnerships and to be more robust in terms of the.

Although it may seem a be clearly defined policies or curricula. Policies on transfer clear about expectations with an example, the European Credit Transfer System (ECTS) is a system of transparency across countries for credit hour conversion. In other information, such as coursework. However, the administrators to determine the appropriate workload. Additionally, administrators Grading systems may vary (1–20 in France) and may take significant time.

Relevant health and safety should be established for staff or ad hoc basis, to enable the student's studies go abroad.

Finally, programs should identify areas of improvement. Adequate resources are critical in the sustainability of the program. Please see the examination of this topic.

**Adequate Resources**

Recruitment and retention of study abroad offices should opportunities be provided. Adequate resources should be put in place to continue with some of the improvements.
its to 3% (up from 1%) on these examples suggest that such situations where global education is the administration is a good starting place to end-of-often financial. During state-established. While there is no one that are fairly common elements in the form of incen-he burden of tuition, fundraising to be unsustainable; therefore, usually available is important. of the institution goes beyond internationalization should be a part of typical course-expectation that students will experience, or it may go so far requirements. Whether it is tuition requirement, successful as many institutional barriers support involves devoting a clear form of a study abroad official, and academic planning. administrative details is time team at the least for a sustainable and credit transfer should be done transfer. Exchange program opportunity and student need. safety of students abroad as of regular program evaluation (NAFSA 2008), will be advertised to exchange will be given credit for taking, edback, documentation and applicant institution. However, it at are taught on their own campus director or temporary admin- of the program. If the faculty of the exchange program, then a successful and sustainable exchange relationship is unlikely. Faculty participation, while sometimes subsidized via course credit or course development payments, is largely voluntary. University faculty often act as stewards of the exchange program. Therefore, faculty involvement in this process is important.

Both student and institutional needs will change over time, as will the economic and educational environment in which they reside and develop. The program offerings should continually change to meet these needs. Therefore, means of effectively assessing and responding to individual and institutional needs should be well established before implementation. Annual reviews of the program portfolio are one's choice of meeting this program requirement. Student as well as faculty input should drive this process. It is important for faculty to provide feedback on the effectiveness of current exchange partnerships and to anticipate which exchange locations and institutions will be most robust in terms of their educational and professional development.

Although it may seem a mundane part of program management, there need to be clearly defined policies and procedures related to transfer credit review and curriculum. Policies on transfer credits vary widely; therefore, it is important to be clear about expectations with the partner institution and participating students. As an example, the European Credit Transfer and Accumulation System (ECTS) offers a system of transparency across Europe and other countries by providing standards for credit hour conversion. In fact, institutions that apply the ECTS standards share other information, such as catalogs of available courses, course descriptions, and associated workload. However, each educational institution is autonomous and it is up to the administrators to decide which courses are acceptable for transfer credit. Additionally, administrators must also consider what constitutes a passing grade. Grading systems may vary widely across countries (e.g., 0–4 in the USA versus 1–20 in France) and so may the typical distribution of grades within each range.

Relevant health and safety risks should be accounted for. At the least, a protocol should be established for dealing with events related to health and safety. Predeparture staff should ensure that students are well prepared to avoid unnecessary risks while away. Therefore, a health and safety review team should be assembled, on a regular or ad hoc basis, to ensure that a proper review has been conducted before students go abroad.

Finally, programs should be regularly evaluated from a process perspective to identify areas of improvement. This process can serve to identify and eliminate costly inefficiencies. Please see Chap. X in this book for a more thorough discussion of this topic.

Adequate Resources

Recruitment and retention of knowledgeable and experienced personnel to lead study abroad offices should be emphasized. Both financial aid and fundraising opportunities should be provided to encourage student participation, and policies should be put in place to control the costs associated with the program (NAFSA 2008).
Selection and placement of competent and experienced exchange program staff is just as important as any other personnel decision. An educational administration leader is a key role for the program due to the curriculum being both cross-cultural and partnership based. Specialized programmatic, administrative, and relationship management knowledge is required. This person needs to be someone who can gain entry into trusted partnerships with colleagues at other institutions.

Funding is perhaps one of the most apparent necessary resources for success. Whether student funding comes in the form of individual payment, grants, fundraising, or institutional financial aid, it should be adequate to make participation in the exchange program feasible for students of widely varying financial means. Some colleges and universities set aside a portion of their annual development efforts for the exchange program. The most frequently cited primary source of funding for international students is personal or family funds (63.4%), but the next most frequently cited source of funding is a US College or University (22.9%), with the remaining sources being a foreign government or university (5.8%), the US Government (0.6%), and so on (IIE 2011). Therefore, not only is the home college or university a widely cited source of funding currently but also there are still plenty of opportunities to defray the financial cost for the individual and their family. Institutional funding may come from a variety of sources, including, but not limited to, endowments, individual donations, federal funding in the form of grants and other opportunities, as well as tuition and fees set aside for the program itself. While accessibility is important for its own educational merit, volume of participation is often a deciding factor in the decision of institutions to continue partnering; therefore, more participation is likely to ensure more sustainability.

Title VI-B grants, a type of US federal funds, have been particularly effective across many schools intent on developing an international curriculum. The Higher Education Act of 1965 (HEA),1 Title VI, part B is a grant program that, in part, is designed to both enhance the international academic programs of institutions of higher education and provide appropriate services to the business community which should thereby expand capacity to engage in commerce abroad. Authorized activities include such things as internationalization of curricula at the junior and community college level and at undergraduate and graduate schools of business, as well as development of area studies programs and interdisciplinary international programs, among many others. These grants are an important consideration due to the breadth of authorized activities and, thereby, their broad availability (Higher Education Act 1965).

Faculty act stewards of international exchange (Peterson 2000) and therefore faculty development can serve as another route to increasing the viability of the exchange program. This resource, however, can also be costly to an institution. Faculty may not have international expertise, nor may not have expert knowledge of the country where a current exchange relationship exists, and may not have expert knowledge of a country with which the university is targeting to develop an exchange relationship. Faculty develop international study tours or to encourage faculty participation which involve faculty assignment at another university in an exchange relationship. This is targeted University and

Clarity and Accountab

There are many stakeholders information related to the pr...
relationship. Faculty development may range from time allowed for self-study to international study tours organized by the home institution. One less costly option is to encourage faculty participation in relevant Fulbright Scholar grant opportunities, which involve faculty assignments in another country—ideally in another country and at another university with which the University or School is targeting for an exchange relationship. This approach is two pronged—establish a relationship with the targeted University and develop faculty expertise in the target country.

**Clarity and Accountability**

There are many stakeholders involved in a successful exchange program. Critical information related to the program needs to be communicated to relevant stakeholders. Clear contracting and auditing procedures should be in place to guard against issues such as conflict of interest (NAFSA 2008).

Information about university policies related to the exchange program, as well as program outcomes, should be articulated to students and made available for relevant stakeholders. Transparency in policy related to all aspects of the program, such as financial aid and transfer credit, will reduce the likelihood of misunderstandings or unmet expectations.

The same rigor that applies to any other services for which the college or university creates contracts should be applied to the agreement with exchange program partners. To provide some insight into the complexity of these agreements and the length of time needed to finalize the agreement, one should be aware of the stakeholders involved and the elements addressed by each contract. Parties involved may include individual faculty, department chairs, deans, and upper administration, among others. Exchange contracts should address those same elements that typical university contracts address, such as conflict of interest, exclusivity agreements, service agreements, and related policy documents. Important elements specific to exchange agreements include quotas for exchange, tuition and fees, extent of participation in a degree program, access to university resources such as health plans and sports programs, language ability expectations, accommodations while abroad, and other elements specific to each university. Contract complexity and length of time needed to finalize agreements will vary with program, but given the number of stakeholders, agreements, and elements of each agreement, it can be a time-consuming process.

Finally, it is important both from the standpoint of utility and getting buy-in from various stakeholders to show that the exchange program is creating a positive effect. This effect can be assessed from various standpoints, including enrollment rates, student satisfaction, change in attitudes of returning students, as well as faculty perception. According to Neal Sobania (N. Sobania, personal communication, November 18, 2012), Director of the Wang Center for Global Education at Pacific Lutheran University (PLU), study-away professionals have taken an attitudinal assessment approach to determine the benefit of its most utilized partnership universities (coined “Gateway Campuses” at PLU) and measured several valued outcomes,
including knowledge of global issues, cultural diversity, intercultural skills, and commitment to citizenship of returning students. These are objectives that happen to be identified by PLU administration and program sponsors as particularly important. The assessment of program outcomes, however, will depend on the institution’s specific strategy or goals. Program impact has been studied, for example, in the form of employment and career advancement (Paige et al. 2009), diversity attitudes (Wang et al. 2009), or personal development (Black and Duhon 2006). The same professional standards apply to study abroad as would any educational institution’s program initiatives. Additionally, there are now psychometrically validated instruments (e.g., Kelley and Meyers 1992) that may be used to assess the impact of studying abroad, as well as compare student scores with normative groups. The latter may become more prevalent for purposes of comparison with other institutions.

**Student Preparation**

Just as with the expatriate preparation and repatriation process in organizations, there should be similar processes for students. A selection process, training program (both logistics and cross-cultural) should be put in place to enable students to develop competencies to effectively adjust to studying abroad. A support system needs to be in place (e.g., emergency numbers and study abroad office personnel) for students while abroad. Finally, resources should be available for returning students to debrief and receive counseling if necessary.

To facilitate knowledge transfer, PLU, for example, holds weekly discussions called “Returner Reflections” during which students share experiences and lessons learned. These group discussions can be not only an effective way of transferring knowledge but also facilitated higher order cross-cultural thinking skills (DeLoach et al. 2003). Some form of counseling should be available for returning students. For example, a paid position for former exchange students wherein they offer peer counseling for returning students (at PLU, this is called “Sojourner Advocate”) works well from a resourcing standpoint.

Enhancing the likelihood of success prior to participation in an exchange program is an integral part of the program. Adequate preparation will reduce the amount of time necessary for the student to transition into the new culture, thereby increasing the amount of time spent acquiring knowledge. This type of preparation is particularly important for short-term exchanges during which the time for experiential learning opportunities is reduced. Cross-culture competencies, rather than simply logistical concerns, should be an important component of this training.

The process of cross-cultural training should result in the departing student learning both the cultural knowledge and skills that will improve interactions by reducing misunderstandings and inappropriate behaviors. This training will not only serve to improve the likelihood of successful acquisition of knowledge during the exchange visit but also serve to reduce the effect of culture shock. In addition to increasing performance and confidence in a new cultural context, training has been shown to increase adjustment as well (Littrell and Salas 2005).

Culture shock, the state in which one behaves in an unfamiliar culture when dealing with people in that culture, progresses in four stages: (1) adjustment, (2) orientation, (3) involvement, (4) participation, (5) integration (Hall 1990; Usunier 1998). A student learns to appreciate the local culture in both their home and host culture, being able to adapt to the local culture through cultural awareness, action, language, and experience for a review of expatriate training, the student should be able to identify their own culture prior to leaving the host country. The impact of host-country programs conducted at home, culture, and language, and experience will differ from those conducted abroad. The effect of culture shock, although less often practiced...

**Student Repatriation**

Repatriation involves returning home, often surprising, because they are not prepared for the reality of returning home. Preparing students for the realities of returning home is critical for their success in the long-term. Information sharing with students is crucial. Likewise, having an explicit purpose of a return system should be designed with the experience in mind. The experience of reentry to one's home institution is often as important as the experience in the host country. Preparing students for the challenges of reentry is as important as the preparation for the experience in the host country.
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Student Repatriation

Repatriation involves returning to a similar environment. Returning students are often surprised, because they do not expect their home to feel new or unfamiliar. Just as global organizations are now aware of the importance of repatriation, so are successful educational institutions. Support staff should be available for returning students. Information sharing should be available for returning students to validate their experiences. Likewise, this information sharing system should be designed with an explicit purpose of knowledge management. This knowledge management system should be designed with codification systems to facilitate student learning.

The experience of reentry shock is common not only because the individual student has acclimated to their new environment but also because their home country, school, and those individuals they knew have often changed in some ways. Likewise, during the initial period of culture shock the student often idealizes their home country and, therefore, returns to an environment that they do not remember. It is helpful to have support staff by way of either regularly employed professionals in the international office or temporary student peer mentors who are available as a form of support. An additional supportive mechanism for re-adjustment involves acknowledging an exchange student’s experience by providing an outlet for sharing information with home institution peers and faculty. A secondary, though perhaps equally important, aspect of this information sharing process is knowledge management.
Knowledge management is generally defined as the conscious management of creating, disseminating, evolving, and applying knowledge for strategic purposes. In this particular case, the knowledge is used both for educational purposes and program process improvements. Knowledge management would, thus, consist of transferring, transforming, and harvesting knowledge for future institutional purposes. While multiple frameworks for distinguishing between different "types of" knowledge exist, one proposed framework for categorizing the dimensions of knowledge distinguishes between tacit and explicit knowledge. Tacit knowledge is conceptualized as the internalized knowledge an individual may not be consciously aware of, such as that which is used while performing a routine task. Explicit knowledge represents knowledge that the individual holds consciously in mental focus, in a form that one is better able to articulate and communicate to others.

Early organizational research suggests that a successful knowledge management effort needs to convert the more difficult to access internalized tacit knowledge into explicit knowledge so that it can be shared, while at the same time permitting individuals to internalize and make personally meaningful any knowledge retrieved during the knowledge management process. One strategy used by organizations, including educational institutions, involves individuals explicitly encoding knowledge into some sort of shared repository, such as an organization-wide accessible database. Known as the codification approach to knowledge management, these strategies include communities of practice (a group of individuals who share a professional interest), best practice-sharing sessions, and internal benchmarking studies. While some of these codification processes only require participation, some may involve technology such as intranets, blogs, wikis, and other electronic repositories.

PLU, for instance, utilizes several codification processes. Rather than specific technologies, this procedure is largely a face-to-face format organized into knowledge transfer meetings. First, the university alternates yearly between an international symposium on a major global topic and an event called World Conversations, wherein faculty and students share their experiences abroad. In addition, students are invited to attend weekly discussion groups referred to as Returner Reflections, wherein students are able to reflect on their experiences, provide a realistic preview for students who are considering studying away, and act as peer mentors by providing advice. These meetings are in addition to several paid positions, called Sojourner Advocates, wherein returnees act as student mentors tasked with counseling peers about education abroad.

Lessons Learned

While the authors of this chapter have varying levels and lengths of involvement with exchange programs, as well as differing interests in the international domains of our respective fields, we have acquired some valuable lessons learned in a combined 50-plus years of exchange program involvement, leadership of tens of study abroad courses, multiple international university site directorships, and accrued faculty development arrangements, such as international Fulbright Scholarships.

Choosing Strategic Partners

Institutional partners should be broad, speaking, this advice important countries and cities, as being fostered at your universities. While it is a great benefit and strategic plan of the college international partners that align college, or university. If a funda
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In our view, international curriculum should simply be requisite to education in
which business management or consulting is a focus. We often use the terms inter-
national or global business, but it is somewhat redundant to refer to "international"
or "global" business education. The modern business environment is one that
involves people and organizations that are globally interconnected; so those programs
that do not provide global perspectives are somewhat remiss in their educational
duties. We also have found exchange programs to be an integral aspect of such
an education, and as such, we would like to share several lessons learned over the
years, which we hope will be helpful for those professionals internationalizing their
curriculum by creating formal exchange agreements.

Choosing Strategic Partners

Institutional partners should be chosen with an emphasis on strategic alignment.
Broadly speaking, this advice means choosing schools that are in strategically im-
portant countries and cities, as well as schools that complement the competencies
being fostered at your university (see Van de Water et al. 2008 for more consider-
ations). While it is a great benefit to have an international emphasis in the mission
and strategic plan of the college or university, it is equally important to choose
international partners that align with the broader goals of the department, school,
college, or university. If a fundamental value of the university is service, then con-
sideration should be given to those regions of the world where service orientation
is likely to be most effective. If the university emphasizes science and technology,
then areas of the world where these fields are advanced and students stand much to
gain should be considered. For a decision at the department or school level consid-
eration should be given to the appropriate level of strategy—for instance, a business
school known for its work in the discipline of environmental sustainability should
give preference to those regions of the world known for their sustainable environ-
mental business, or "green" economic. There are multiple benefits to this approach.
In addition to further signaling the comparative advantage of the department or
university, the faculty are likely to benefit from collaboration with peers and develop-
ment of expertise, further strengthening the school's reputation. Additionally, be-
cause the exchange programs are largely a function of faculty interest and support,
it is likely that the interest of participating faculty will not wane.

Scalability

It is important to choose a path to establishing an exchange program of the scale that
works for your particular college or university. The number of institutional partners-
ships and locations that enables the volume of student exchanges at a resource-
rich university with an average enrollment of 30,000 and strong global education
mission will surely differ from a university of modest resources with enrollment
of less than 10,000 and weak administrative support. While both should be able
to internationalize their curriculum via an exchange program, the former is likely to enable sustainable partnerships with multiple institutions in disparate locations, whereas the latter is more likely to benefit from focusing resources on strong partnerships with fewer institutions that are strategically aligned in terms of mission. It does not take an abundance of resources or enrollment to establish an effective exchange program, but fewer resources that require more thoughtful execution (for a detailed case, see Cort et al. 2003). Ensuring that there is enough support to reach the scale that is appropriate for your institution and strategy is paramount. This practice will help avoid establishing an exchange partnership that results in transferring fewer than the target number of transfer students (which should be outlined in the exchange agreement).

**Faculty Involvement**

Faculty enthusiasm is critical. Recruiting, hiring, developing, and retaining faculty whose professional and scholarly interests are in accord with your exchange program goals are important for meeting and sustaining program goals. Faculty are the first line of advertisement to students regarding international exchange coursework. Likewise, faculty will often be the ones keeping relationships warm at partner institutions. Therefore, hiring faculty with a research stream with a global emphasis likely will sustain the program. Additionally, supporting curricular development and faculty development to enhance exchange relationships will have a positive impact on international curriculum, home country curriculum, and faculty research. Faculty engagement will be enhanced considerably by participation in consortiums, as well as development opportunities funded by the US federal government.

In terms of consortium participation, it is advantageous to be involved with the ACE project, including participation in the ACE Internationalization Collaborative. Additionally, it is helpful for faculty to also participate in local organizations that serve as communities of interest, such as Northwest International Business Educators Network (NIBEN), established in the mid-1980s and currently overseen by the Center for International Business Education and Research (CIBER) at the University of Washington.

Faculty development opportunities wherein the participating individual can spend time studying in a different country can be particularly useful. PLU faculty participated in multiple Fulbright grant opportunities, including China 1982–1983, Norway 1992–1993, and Poland 1999–2000. The China 1982–1983 Fulbright grant, which involved teaching management to Chinese students (something very new since the market had just liberalized in 1979), resulted in one faculty developing a lifelong interest in business in China, which helped sustain exchange relationships with two Gateway Campuses.

Finally, Title VI-B grants, while a source of funding, also allow for additional faculty participation in internationalizing curriculum. At PLU, the business school received two US Department of Education Title VI-B grants. The first, 1984–1986, was awarded for the purpose of internationalizing PLU’s BBA curriculum.

**The Importance of Interdisciplinary Collaboration**

Regardless of whether your inst research or pedagogy, it is typical to see viability of the partnership to be number of faculty and workload be more or less advantageous to number of faculty who have a reing other departments will likely which in turn will likely increase over time—even as the interest ebb and flow. At PLU, there has been a focus on international collaboration with different institutions. The Globalization Committee was formed to approach the issue of globalization head-on and to develop strategies that would help students prepare for global careers.

**Conclusion**

The continued proliferation of lesser number of recent graduates possess entry-level global roles. These or high-quality decision making, hulation of diverse viewpoints, er satisfaction, improved leadership, and Intercultural Competencies such Intercultural Competencies such

While, the benefits are nume tive exchange program are even from the university down to the d and strategies driven by, and con Funding, by way of endowment, t
second was designed to enhance trade. It was a 1996–1998 US–China Trade Development grant, under the Department of Education’s Business and International Education program (along with the corporate partner of World Trade Center, Tacoma). This second grant involved funding faculty development by way of study tours of China, full semester visits of students to Sun Yat-Sen University (a University which PLU shares an exchange relationship with to this day), as well as educating faculty and members of the World Trade Center on business in China. Each of the examples above demonstrates faculty-led initiatives that funded, transformed, and sustained an internationalized curriculum.

The Importance of Interdisciplinary Partnerships

Regardless of whether your institution encourages interdisciplinary partnering for research or pedagogy, it is typically advantageous for the long-run to not leave the viability of the partnership to be dependent on one department. Depending on the number of faculty and workload of faculty within your department or school, it will be more or less advantageous to involve faculty in other disciplines. Increasing the number of faculty who have a relationship with your exchange partner and involving other departments will likely result in higher quantity of student involvement, which in turn will likely increase the likelihood that the program will be sustainable over time—even as the interest and involvement of your department faculty may ebb and flow. At PLU, there has been a long-standing cross-disciplinary committee with a focus on international education. In the 1980s, an International Education Committee was formed to approve student applications for study abroad, which evolved into what is now the Global Education Committee, tasked to not only approve study abroad applicants but also evaluate student grant proposals seeking funding and other development opportunities. This committee has been particularly important for sustaining university-wide internationalization of curriculum.

Conclusion

The continued proliferation of exchange programs should serve to bolster the number of recent graduates possessing the cross-cultural competencies necessary for entry-level global roles. These competencies are likely to result in innovative and high-quality decision making, high levels of critical analysis and thought, stimulation of diverse viewpoints, enhanced cognitive development, higher levels of satisfaction, improved leadership, as well as higher levels of broad and important Intercultural Competencies such as Global Mindset and CQ.

While, the benefits are numerous, the resources necessary to establish an effective exchange program are even more numerous. The need for leadership support from the university down to the department level is critical. Clearly specified goals and strategies driven by, and connected to, the institutional mission are necessary. Funding, by way of endowment, tuition, government support, and other sources will
have to be adequate and continuous. Finally, the work associated with effectively managing a program is great, requiring a dedicated center for maintaining control, accountability, student services (e.g., preparation and repatriation), and any other programmatic needs. However, the reward of an international exchange program is both great and necessary.

Appendix

Checklist for establishing and sustaining a unique international exchange program

1. Institutional Commitment
   - The study abroad program has been designed in accord with the department, school, or university educational strategy
   - There is clear overlap between the internationalization efforts of the department or school and the university
   - The educational institution has established study abroad as a key element of the educational process
   - There are financially sustainable plans to support study abroad
   - The exchange program is an integral part of academic life
   - There are necessary systems and processes to provide institutional oversight

2. Study Abroad Infrastructure
   - Institutional barriers (such as inflexible major curricula) that restrict student access to study abroad have been identified and removed
   - A study abroad management office has been established
   - A structured approach to planning for course approval and credit transfer is in place
   - Policies have been established to guide credit transfer
   - A process is in place to review exchange program options and respond to academic opportunity and student need
   - Systems for international faculty (i.e., faculty of study abroad courses, program leaders, and site directors) selection, training, support, and debriefing have been established
   - Systems have been established to manage the health and safety of students (and participating faculty) abroad
   - Systems have been established to manage institutional risk of having students abroad
   - A regular program evaluation has been established for the purpose of continuous program improvement

3. Adequate Resources
   - There are experienced personnel to lead a study abroad office
   - Financial aid opportunities have been established to encourage student participation

7. Preparing Global Managers:
   - Fundraising opportunities
   - Policies have been put in place
   - Secondary revenue-generating other institutions
   - A system for replacemen

4. Clarity and Accountability
   - Key stakeholders, who have been identified
   - Metrics have been established
   - A plan has been designed
   - Clear contracting and such as conflict of inte

5. Student Preparation
   - A process has been established in the study abroad process
   - A cross-cultural training
   - A predeparture training of the program
   - A support system (e.g., employee) is available at the location
   - Resources are available counseling upon return

6. Student Repatriation
   - Support staff are available
   - Information sharing is experiences
   - A knowledge management systems, to facilitate

A Note on Outsourcing

The above checklist is design own exchange program. They for-fee program management tate the decision to outsource; benefits associated with deve
7 Preparing Global Managers and Consultants: A Justification and Framework …

- Fundraising opportunities have been established to encourage student participation
- Policies have been put in place to control the costs (at least maintaining "cost-neutral") associated with the program
- Secondary revenue-generating possibilities (e.g., marketing program for use by other institutions) of the program have been identified
- A system for replacing outgoing faculty, academically and financially, is in place

4. Clarity and Accountability
- Key stakeholders, who have an interest in the successful exchange program, have been identified
- Metrics have been established for regular assessment of program effectiveness (e.g., net cost, academic quality and content, student and staff experiences)
- A plan has been designed for communicating critical information related to the program needs to relevant stakeholders
- Clear contracting and auditing procedures are in place to guard against issues such as conflict of interest

5. Student Preparation
- A process has been established for selecting students who will be successful in the study abroad program
- A cross-cultural training program is in place to enable students to develop competencies to effectively adjust to studying abroad
- A predeparture training has been designed to prepare students for the logistics of the program
- A support system (e.g., emergency numbers and study abroad office personnel) is available at the home institution for students while abroad
- Resources are available for students to receive debriefing at a minimum and counseling upon returning

6. Student Repatriation
- Support staff are available for returning students
- Information sharing is available for returning students to validate their experiences
- A knowledge management system has been designed, with specific codification systems, to facilitate student learning

A Note on Outsourcing

The above checklist is designed for institutions that will develop and manage their own exchange program. There are established third-party organizations that offer for-fee program management services. Institutional strategy and resources will dictate the decision to outsource; however, one should take into account the costs and benefits associated with developing a program without a third party. The costs of
designing, delivering, sustaining an exchange program may seem unwieldy. Indeed, the costs are many; time, money, expertise, focus, and risk management that could be used elsewhere. However, there are many benefits to managing the program at one's own institution: tuition dollars and tuition discounts kept within the institutional budget, seamless integration of study abroad experiences with university curriculum and mission, greater opportunity for “internationalization of the campus,” faculty development opportunities to enrich teaching, learning, and research, unique programs as positive marketing brands for the university, marketing of study abroad programs to students at other universities to bring in external revenue, to name a few.

References


Preparation of Global Managers and Consultants: A Justification and Framework...


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tutional experiences with university curricularization of the campus, learning, and research, unique visiting, marketing of study abroad external revenue, to name a few.


