



THE FORUM ON EDUCATION ABROAD QUALITY IMPROVEMENT PROGRAM (QUIP)

INSTRUCTIONS FOR INSTITUTIONS AND ORGANIZATIONS
UNDER REVIEW

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Revised 2017

THE
FORUM
ON EDUCATION
ABROAD

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THE QUALITY IMPROVEMENT PROGRAM (QUIP): OVERVIEW

QUIP is designed to help an organization improve the quality of its education abroad programming. The ultimate aim of a QUIP review is to benefit students, the organization under review, and the field of education abroad.

The Quality Improvement Program for Education Abroad is a quality assurance process intentionally modeled on the accreditation processes of U.S. higher education.* The Forum on Education Abroad's [*Standards of Good Practice for Education Abroad*](#) provide the framework of QUIP. QUIP is intended exclusively for institutions and organizations based in the U.S. or in other countries that provide education abroad opportunities for outbound students from U.S. institutions.

For institutions that do not manage their own education abroad programs, QUIP focuses on the operations and quality assurance mechanisms of an education abroad office responsible for sending students abroad.

Quality assurance and improvement in education abroad is a continuous process. One of the most important goals of the QUIP review is to build assessment and improvement into the basic procedures and the culture of an organization and its education abroad programs using The Forum's *Standards of Good Practice*.

**While modeled on accreditation processes, The Forum is not an accreditor and QUIP is not a compliance review or an accreditation or certification process. However, organizations have found a QUIP review helpful as an integrated part of a formal accreditation review.*

THE QUIP PROCESS: AN OVERVIEW



ROLES IN THE REVIEW

The Organization: the institution of higher education, independent program provider or host institution that is the subject of the review.

The Self-Study Team: Composed of administration, staff, and faculty from the organization under review, this team collaborates to produce a comprehensive self-study of education abroad at the organization.

The Self-Study Team Leader: Coordinates all aspects of the QUIP review at the organization and serves as the primary contact with Forum Staff.

The Peer Reviewers: Experienced education abroad professionals trained by The Forum, the Peer Reviewers examine education abroad operations at the organization under review. They make judgments about whether the organization is in substantial conformity with the individual *Standards of Good Practice*, commend the organization for any outstanding practices, and make suggestions and recommendations for quality improvement.

The Forum Review Panel: Composed of education abroad professionals appointed by a joint committee of The Forum Council and Board of Directors, The Forum Review Panel reviews the Self-Study Report, the Peer Review Report, and the Organization Response and makes a Final Determination as to whether or not the organization is in substantial conformity with the *Standards of Good Practice*.

The Forum President and CEO: Communicates The Forum Review Panel's decision to the organization.

The Forum Staff: Always accessible to all involved in the QUIP Review, The Forum Staff ensures the integrity of the review process, coordinates logistics, and facilitates communication between all parties. One Forum staff member accompanies Peer Reviewers on each Site Visit. The Forum staff also is responsible for communicating with the organization about the Interim Report and recognition renewal process.

INSTRUCTIONS

THE SELF-STUDY REPORT

The first stage in the QUIP Process is the preparation of a Self-Study Report by a Self-Study Team appointed by the organization under review. Typically, this Team will include administrators, faculty, and staff. The Self-Study Report includes the Self-Study Narrative, the Organization Profile, and may include other worksheets.

1. Assemble a Self-Study Team

- An effective Self-Study Team includes 3-5 team members.
- In reviews involving multiple programs or offices, consider a larger team that includes representatives from each program site or office.
- The senior international officer (SIO) should be involved for reviews at institutions, either as a member of the Self-Study Team or in an advisory role. At program provider organizations, a member of the executive staff should be involved.
- At organizations where faculty are actively involved in education abroad programs, faculty representatives should be included on the Self-Study Team.
- For institutions, including at least one staff member outside the education abroad office increases the investment of the whole institution in the review, and adds value to the review.
- Teams should include a skilled writer with experience in preparing comprehensive reports. This may or may not be the Team Leader.

Conducting a comprehensive Self-Study is more than writing a report. The process of self-assessment in itself is important and beneficial. The Self-Study Team should use this as an opportunity to explore the organization's mission, philosophy, policies, and procedures and assess the extent to which current practices are serving the education abroad goals of the organization. The resulting Self-Study Report should provide a comprehensive portrait of the organization's education abroad operations, and the beginning of a dialogue on quality improvement with the Peer Reviewers.

2. Designate the QUIP Self-Study Team Leader

The Self-Study Team Leader is key to the QUIP process. The Team Leader must be given the responsibility, authority, and the time to coordinate the QUIP review.

Self-Study Team Leader Responsibilities:

- Serves as the organization's main contact with The Forum
- Provides guidance and assistance to the Self-Study Team
- Coordinates meetings of the Self-Study Team
- Ensures that deadlines are met
- Coordinates the writing of the Self-Study Report
- Submits the Self-Study Report to The Forum
- Plans and coordinates Site Visit(s)

A vital role of the QUIP Self-Study Team Leader is to keep the Self-Study on track. The Self-Study Team Leader should be able to communicate regularly and openly with Team members and any on-site staff, to check on the status of Self-Study assignments, and to facilitate the sharing of information between team members and information from The Forum.

3. Prepare for QUIP

Establish a Timeline

A realistic timeline is crucial to keeping the project on track and establishing expectations among the Self-Study Team and other stakeholders. It should plan for weekly meetings of the Self-Study Team.

Considerations for establishing a realistic timeline include:

- When are the organization's busiest periods? When will staff and program directors have time to devote to the Self-Study and the Site Visits?
- When and how will students be available for meetings with the Self-Study Team and with Peer Reviewers during the Site Visits? For example, during mid-terms, breaks, and final exam periods, students might not be available.
- When will constituents be away from the home office, or from the international program site?
- For institutions: what are especially busy periods for other units, such as the Registrar's office, Financial Aid, Student Affairs or internal research offices?

Please note that the Self-Study Report must be submitted within 6 months of receiving the QUIP materials. Failure to meet this deadline may result in the termination of your QUIP Review.

Build in support

Key stakeholders should be engaged at the outset of the Self-Study process. The Team Leader should contact all stakeholders in education abroad and/or international operations and make sure that appropriate representatives within these departments or groups are aware of the participation in QUIP, understand its goals, and are willing to provide input. Stakeholders within the organization, but outside education abroad operations, who may be consulted or interviewed during the process should be identified and contacted.

Plan communication and information gathering

From the beginning the Self-Study Team should plan communications, meetings and information needed for the Self-Study, and determine:

- How will the work be divided among the Team members?
- What data will be needed for the Self-Study, how and who within the Team will gather the data?
- How will data be shared among Team members?
- What meetings will be needed? How often?
- Who will interview whom? Will opinions be sought in writing? Verbally?

Prepare the Self-Study Report using the Self-Study Narrative Template as a guide, together with supporting materials. Complete the Organization Profile Form to provide context. Submitting completed Queries Worksheets is optional.

THE SELF-STUDY NARRATIVE, THE STANDARDS, & THE STANDARDS QUERIES

In conducting the Self-Study, the [*Standards of Good Practice for Education Abroad, 5th ed. \(2015\)*](#) should be used as a framework, structure, and guide. The main goal of the Self-Study should be to present an accurate description of the organization's education abroad activities, and to analyze them with in relation to the *Standards*.

Review the [Template for the Self-Study Narrative \(Appendix A\)](#) with the Self-Study Team before

beginning work on the Self-Study Report in order to plan the analysis, information gathering, interviews, and discussions that are needed to complete the Self-Study. A Sample Self-Study Narrative is available in [Appendix C](#).

The Queries Worksheets (attached to the ‘Welcome to QUIP email’) are designed to help the Self-Study Team to build a comprehensive Self-Study. They should be used to make notes as the Team conducts the Self-Study analysis, and these notes should be used to build and structure responses to the questions on the Self-Study Narrative Template. The Queries Worksheets help organize data as factual responses and track references to supporting documents and electronic resources. The responses to the Narrative Template questions allow for qualitative discussion of the background behind these facts.

NOTES:

- Some areas of a Standard may refer to activities in which the organization does not engage, and not all Queries are applicable to all types of education abroad programming.
- The Queries Worksheets may be submitted to The Forum if the Self-Study Team thinks that it will be of use to the Peer Reviewers, but submission is not required.

Focusing on the Self-Study process will lead to probing discussions about what the organization is doing, why, how well it is being done, and how to change or carry plans into the future. The results of these discussions should be conveyed to the Peer Reviewers through the Self-Study Narrative.

An effective Self-Study Narrative:

- Analyzes the organization’s education abroad activities using *the Standards of Good Practice for Education Abroad* as key indicators of quality.
- Presents a comprehensive, straightforward and honest description of how the organization does what it sets out to do.
- Makes clear what is important at the organization: What are its most important education abroad activities? How do they relate to the mission? Who are the key players?
- Explains the unique attributes of the organizational culture that Peer Reviewers should be aware of in order to form a good understanding of the organization and its programs.
- “Shows” rather than simply “states” how the organization carries out its programs in reference to the *Standards*. In other words, it supports statements, wherever possible, with materials documenting practices, policies and procedures. These should be included as appendices or hyperlinks to websites.
- Is frank about any challenges and issues the organization faces.
- Articulates any specific areas for the attention of the Peer Reviewers.

**ADDITIONAL INSTRUMENTS OF THE QUIP REVIEW:
THE AFFILIATED PROGRAMS INVENTORY AND PORTFOLIO**

Some institutions exclusively utilize the services of program provider organizations for their education abroad offerings, either as their primary source of education abroad programming or to supplement the institution’s own program offerings. In this case, the QUIP review is not intended to be a review of each provider organization’s programs. Instead, it assists the institution in assessing its own internal mechanisms for exercising quality assurance of the provider programs.

When provider organizations supply the majority of an institution's education abroad programs, the QUIP review will include two additional worksheets to organize information about the institution's portfolio of provider offerings, and its quality assurance of these offerings:

- a. **Affiliated/Provider Program Inventory** This inventory details basic information about the institution's affiliated education abroad programs including: location, type of affiliation, average number of students attending per offering, credits earned, and departmental approval process.
- b. **Affiliated/Provider Programs and the *Standards* Worksheet:** A key to understanding how well affiliated programs serve an institution's students is to know how these programs stand in relation to The Forum's *Standards*. This worksheet supports institutional quality assurance by delineating what is known about a program, how it is known, and the depth of information available. It tracks sources of information made available from program provider organizations.

SUBMITTING THE SELF-STUDY REPORT

The completed Self-Study Narrative, supporting documentation and Organization Profile should be submitted to The Forum electronically. Please contact The Forum staff at quip@forumea.org to determine which submission method will work best.

The Forum staff will distribute the Self-Study Report to the Peer Reviewers.

When submitting the Self-Study Report, organizations should submit a preliminary schedule for the [Site Visit\(s\)](#).

NOTE: *The Forum must receive the Self-Study Report no later than one month before the scheduled Site Visit(s) in order for the Peer Review Team to have enough time to review the documents thoroughly. A delayed submission of the Self-Study Report may result in rescheduling the Site Visit(s). Should the organization believe it will not be able to meet the Self-Study deadline, it should communicate with The Forum staff at least 60 days in advance of the deadline, to coordinate any rescheduling. A delay of more than six months, or more than two delays will result in forfeiture of the review fee, and termination of the review.*

THE PEER REVIEWERS AND PEER REVIEW REPORT

In the second stage in the QUIP Process, a Peer Review Team of two or more Peer Reviewers examines the Self-Study Report, visits the organization and a program site, accompanied by a Forum staff member, and issues a Peer Review Report. The organization then responds to the Peer Review Report.

Peer Reviewers are experienced education abroad professionals, selected by the Forum Review Panel and trained in the QUIP process by The Forum staff. For each review, Peer Reviewers sign forms indicating that 1) they have no known conflicts of interest in conducting the review and 2) they will keep all materials in the Self-Study, the content of meetings, and the results of the review confidential. The Peer Reviewers strive to help the organization meet its goals by providing collegial, unbiased feedback in the Peer Review Report. Their work is overseen by Forum staff and their written report is the property of The Forum.

The Forum will contact the organization with the names of prospective Peer Reviewers as the Self-Study

process draws to a close. Every effort will be made to select a Peer Review Team that is acceptable to the organization and available at the dates requested by the organization, but final selection rests with The Forum.

A member of the Forum staff will accompany the two Peer Reviewers as part of the Peer Review Team on the Site Visits to ensure the integrity of the review.

SITE VISITS

In most cases, there will be two Site Visits conducted, one at the home office or headquarters, and one at a representative program site. If an organization runs a large number of programs, more than one representative site may be visited.

Typically, the Review works best when any overseas Site Visits take place after the Visit to the home office/headquarters.

As previously stated, there must be at least a month available to the Reviewers to review the Self-Study Report and prepare for the Site Visit(s).

Each Site Visit is planned to include **two and a half days** of meetings. The organization should prepare a preliminary agenda to be submitted with the Self-Study, but the Peer Review Team may also request that additional meetings be added. The Peer Review Team has the prerogative to determine the final schedule for the Visit.

THE SITE VISIT AGENDA

Although schedules for Site Visits will vary from organization to organization, these key elements should be included in all Visit schedules:

- Time for the Peer Review Team to meet by themselves, both at the beginning of the Site Visits and at the end,
- At least two meetings with the Self-Study Team Leader, at the beginning and at the end of the Site Visit,
- A meeting with the Senior International Officer, Chief Academic Officer, or the person to whom the Senior International Officer reports (at institutions), and appropriate members of the executive staff at program provider organizations.
- Meetings with faculty—these can be faculty who teach education abroad participants, program or resident directors, or faculty from departments sending significant numbers of students abroad,
- Meetings with students—those on the program and/or returnees,
- At least one meeting with the entire Self-Study Team,
- Some flexibility for the Peer Review Team to make changes to the schedule based on what may be learned as the Visit progresses, including enough room to allow for additional meetings, if required,
- Reasonable time between meetings to allow for restroom and refreshment breaks.

NOTES:

- The Self-Study Team Leader must be available for the days of the Visits. Typically, the Self-Study Team leader manages the schedule of the Site Visit, making

- introductions, showing the team from one meeting to the next, etc.
- The Self-Study Team leader is not expected to attend every meeting. The Peer Review Team should have the opportunity to meet with with on-campus and on-site administration faculty, staff, and students without the Self-Study Team Leader present.
- All parties scheduled to meet with the Peer Reviewers should be thoroughly briefed by the Self-Study Team Leader in advance of the meeting, so that they are aware of the goals of the QUIP Review, know what The Forum is, and are familiar with the materials that the Peer Reviewers received.
- The Peer Review Team should have access to a place where they can meet privately, as well as Internet access during the Visit. If requested in advance and available, please provide the Team access to a laptop computer.

Before the visit, The Self-Study Team should send the following to quip@forumea.org for the Peer Review Team:

- information regarding airport transport, accommodations, and meals,
- contact information for the Self-Study Team Leader and any staff members assisting with logistics of the Site Visit,
- maps, directions, or any special information required to navigate the immediate environment (how to get a taxi, etc.),
- an updated copy of the Site Visit schedule that includes the names and titles of people with whom the Peer Review Team will meet,
- any additional informational materials the Peer Reviewers have requested.

The organization is responsible for:

- arranging reasonable accommodations,
- ground transport to and from the airport or train station, if necessary,
- ground transport to and from accommodations to the meetings, if necessary,
- meals: breakfast (if not available at the hotel), lunch, and coffee breaks. The institution is not expected to provide or host evening meals, but restaurant recommendations are appreciated.

The Forum staff makes flight or other travel arrangements for the Peer Reviewer Team and reimburses any review-related out-of-pocket expenses. The Forum then invoices the organization for these expenses after the Review is complete.

THE PEER REVIEW REPORT

Four to six weeks of the conclusion of the Site Visit, the Peer Review Report will be sent to the organization.

The Peer Review Report makes judgments about whether the organization is meeting each Standard and offers suggestions, recommendations and requirements.

The Peer Review Report is composed of:

- Judgments of the degree to which the organization is in substantial conformity with each of the *Standards of Good Practice for Education Abroad*;
- Analysis corresponding to each judgment that includes any commendations for excellent practices, and/or suggestions, recommendations, and requirements for improvement;

- A concluding recommendation made to The Forum Review Panel as to whether the organization is operating in substantial conformity with the *Standards of Good Practice for Education Abroad*. Possible recommendations: ‘yes’ or ‘not yet.’

The Peer Review Report provides judgment of the degree to which the organization is meeting each Standard: Demonstrates substantial conformity, Demonstrates partial conformity, or Demonstrates significant deviation.

Definitions:

Substantial conformity: The organization demonstrates effective application of all of the *Standards of Good Practice for Education Abroad*, and a commitment to quality improvement.

Partial conformity: The organization shows areas in need of minor improvement before reaching substantial conformity. These areas for improvement would not have significant implications for student health, safety, learning and program operations, or significant ethical implications.

Significant deviation: The organization demonstrates areas where major improvement is required. These areas may have significant implications for student health, safety, and learning and/or ethical implications in program operations.

- If the organization demonstrates *substantial conformity* with the Standard, the Report will include **suggestions** for quality improvement. Suggestions are collegial, non-binding advice for improvement.
- If the organization demonstrates *partial conformity* with the Standard, the Report will include **suggestions** and **recommendations** for quality improvement. Recommendations indicate that action is needed to arrive at substantial conformity, and are binding to the extent that in the Interim Report, the organization will be asked to show how it has addressed the recommendations.
- If the organization demonstrates *significant deviation* from the Standard, the Report will include **requirements** for quality improvement. The Report will detail how the organization is not yet in substantial conformity with the Standard, and specify actions needed to reach conformity in future QUIP reviews.

See [Appendix B](#) for the Peer Review Report Template.

THE ORGANIZATION RESPONSE

The Self-Study Team should carefully review the Peer Review Report, and formulate its Organization Response. The Organization Response provides an opportunity for the organization to correct any factual errors and clarify basic misunderstandings in the Peer Review Report. These corrections are typically of a nature such as misspelling a name, or misstating the role or title of an administrator.

Why an Organization Response?

In any external review, there is a possibility of misunderstandings. The Organization Response provides the organization under review with the opportunity to address any remarks made by Peer Reviewers that might indicate a misinterpretation.

The Self-Study Team may also at this time choose to identify aspects of the Peer Review Report with which it agrees or disagrees. Statements should be concise, but should give specific reasons for any disagreements.

Finally, the Organization Response may discuss plans for improvement, addressing any suggestions, recommendations and requirements made by the Peer Reviewers.

See [Appendix D](#) for a sample Organization Response.

THE FORUM REVIEW PANEL AND FINAL DETERMINATION

In the final stage of the QUIP Review, The Forum Review Panel reviews the Self-Study Report, the Peer Review Report, and the Organization Response, and communicates a decision to The Forum President and CEO describing the results of the evaluation.

Finally, The Forum President and CEO issues a Final Determination Letter to the organization summarizing the findings of the QUIP review.

The Forum Review Panel (FRP) is composed of education abroad professionals appointed by a joint committee of The Forum Council and The Forum Board of Directors. Each FRP member must sign a confidentiality agreement and conflict of interest statement. Typically, two panel members will each read the Self-Study Report, the Peer Review Report, and the Organization Response, and offer an opinion as to whether the materials submitted provide evidence that the organization is in substantial conformity with the *Standards of Good Practice for Education Abroad*. If the two readers agree, a Final Determination Letter will be sent to the organization indicating the result of the review. If there is disagreement, a third FRP reader will be assigned.

THE FINAL DETERMINATION

The Forum believes that all organizations have the capacity to conduct their programs in substantial conformity with the *Standards* and practice ongoing quality improvement. The QUIP process is not a pass/fail test and the result is not a simple yes or no answer. Rather, the two possible Final Determinations are:

- 1) **The organization is in substantial conformity with the *Standards of Good Practice for Education Abroad* and practices ongoing quality improvement.** This finding is valid for up to eight years, provided the organization completes the required Interim Report after four years.
- 2) **The organization is not yet in substantial conformity with the *Standards of Good Practice for Education Abroad*.** Organizations that receive this Final Determination have a two-year period during which they may address the Peer Reviewers' requirements and recommendations before then participating in a modified QUIP process. The modified QUIP process will involve a new set of Peer Reviewers and focus specifically on the areas with which the organization was found not to be in substantial conformity.

The Forum’s goal is to assist each organization to be the best that it can be.

USE OF THE WRITTEN MATERIALS

The Self-Study Report is the property of the organization and can be used however the organization sees fit.

The Final Determination Letter may also be used by the organization in any way desired, including for publicity purposes.

The Peer Review Report remains the property of The Forum and *may not be disseminated outside the organization*. It may be used by the organization as an internal document to help to improve its education abroad programming, but it may not be used for external purposes such as posting it on the web for the public to view, or for quoting for marketing purposes.

RECOGNITION AND PUBLICITY

The Quality Improvement Program recognizes those organizations that are found to be in substantial conformity with the *Standards of Good Practice for Education Abroad*. Organizations are encouraged to promote this recognition in their printed materials, on their websites and among their constituents. Guidelines about recognition and publicity are provided to organizations upon successful completion of the QUIP. In brief, during the eight-year period that the Final Determination is valid, an organization may:

- Quote from the Final Determination Letter in promotional materials
- Display the “Recognized for Meeting Standards” logo in printed materials and on its website
- Participate in exclusive opportunities designed especially for organizations that have successfully completed QUIP

Please note that the use of “Recognized for Meeting Standards” logo is reserved to the organization that was the subject of the review. The “Recognized for Meeting Standards” logo is not transferable; it may not be used by partners, affiliates or the School of Record of the organization.

Organizations affiliated with the QUIP-recognized entity, such as Schools of Record, may promote their partnership with the QUIP-recognized organization, but may not use the QUIP logo. It is the responsibility of the QUIP-recognized organization to monitor such use to make certain that affiliated entities follow the guidelines outlined here.

THE INTERIM REPORT

Organizations recognized for meeting the *Standards of Good Practice for Education Abroad* are required to furnish an Interim Report four years after a successful QUIP Review. This Interim Report is an executive summary of approximately five to ten pages in which the organization analyzes the current state of its education abroad operations and how it is continuing to meet the *Standards of Good Practice*, including how it has addressed recommendations made in the Peer Review Report.

Organizations will receive instructions from The Forum by email at least four months before the Interim Report is due.

Interim Reports will undergo a preliminary review by Forum staff to verify that the necessary information has been provided. The Forum Review Panel will then review the Report to make a determination about the organization's ongoing commitment to quality improvement. The Forum President and CEO then will issue a letter regarding the organization's QUIP Recognition.

Failure to submit an Interim Report within the specified timeframe will result in the revocation of an organization's recognition.

QUIP RECOGNITION RENEWAL

QUIP Recognition is valid for eight years. In the eighth year after a successful QUIP Review, an organization must undergo QUIP Recognition Renewal in order to maintain recognition for meeting the Standards of Good Practice for Education Abroad. The Forum will contact the organization at least one year before the deadline to complete Recognition Renewal with information on how to initiate the process.

QUIP Recognition Renewal follows the QUIP Review model of Self-Study, Peer Review, and Final Determination, but uses the organization's past QUIP Reviews and Interim Reports as a frame of reference. The Recognition Renewal process analyzes how an organization has continued to meet each of the *Standards of Good Practice* in the years following the previous reviews, and details the organization's response to any suggestions or recommendations previously made by Peer Reviewers.