

# *The Forum on Education Abroad* **Strategic Plan 2021-2027**

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# The Committee (13)

## Board Members:

- Enda Carroll, UCD
- Christopher Elliott, UVA
- John Lucas, ISEP
- Bruce Sillner, SUNY
- Lorna Stern, Arcadia

## Members at Large:

- Kendall Brostuen, Brown
- Léa Senn, Cattolica

## Council Members:

- Keshia Abraham, Abraham Consulting Group
- Tracey Bradley, TnCIS
- Joy Phaphouvaninh, Univ of Illinois at Urbana-Champaign

## Staff:

- Lindsay McCauslin, Director of Membership & Outreach
- Natalie Mello, VP for Programs, Training & Services
- Melissa Torres, President & CEO



## The Consultant



**Reggie Hammond**  
Founder & Managing Partner  
Your Crescendo

# The Process

## Stakeholder Input:

- Focus Groups
- Interviews
- Survey
- Net Promoter Score



## Steps:

- Purpose/Mission
- Vision
- Think Big (5+ years)
- Start Small (1-2 years out)
- Scale Fast (3+ years out)
- Headline Indicators  
(what to measure)
- Action Plan

# HOW THE STRATEGIC ARTICULATION WORKS

*An Illustrative Example*

## Vision Snapshots

### Think Big



#### **INCLUSIVE MEMBERSHIP**

Inclusive membership from a diversity of organizations and individuals who are engaged with education abroad from the U.S. and around the world

### Start Small

- We have diversity in our membership and engage them in our board, council, staff, committees working groups

### Scale Fast

- More diverse members from HBCUs, minority serving institutions, international institutions, community colleges

### Headline Indicators

- Once membership data are collected further, compare to existing data available within field of education abroad (in U.S. and worldwide)

### Critical Initiatives

- Identify appropriate methods to collect membership engagement data for both individuals and organizations, to include demographics.
- Identify and cultivate Forum/board champions within organizations
- Collect and identify data on organizations represented within Forum - to include regions (within U.S. and global regions), organizational types
- Track 'engagement' of individuals within organizations to gauge where and how members are connecting with Forum services and programs
- Include a wider set of members within each member organization

#### **THINK BIG:**

Vision Snapshots of what we aspire to see at the end of 2025

#### **START SMALL:**

Vision Snapshots of what we aspire to see at the end of 2021 and 2023 respectively.

#### **HEADLINE INDICATORS:**

What we will measure and manage to track our progress.

#### **CRITICAL INITIATIVES:**


Projects and Action Items we will need to complete to create the visions we're working to create.

# SUMMARY

**OUR PURPOSE**  
The Forum on Education Abroad

## CULTIVATES EDUCATORS


WHO CHAMPION  
HIGH QUALITY EDUCATION  
ABROAD EXPERIENCES THAT



**IGNITE  
CURIOSITY**




**IMPACT LIVES**



**CONTRIBUTE TO  
A BETTER WORLD**


**OUR VISION**  
The Forum envisions a future in which

## EDUCATION ABROAD




is integral to the mission  
of higher education,  
**MEETS STANDARDS  
OF GOOD PRACTICE,**  
and  
**IS ACCESSIBLE TO ALL STUDENTS.**

**STRATEGIC PRIORITY:  
BUILD THOUGHT LEADERSHIP**




**INTERNATIONAL EXPERIENCE**




**WIDELY CITED RESEARCH**


**STRATEGIC PRIORITY:  
GROW OPERATIONS**



**MISSION-ALIGNED  
PARTNERSHIPS**




**MUST-HAVE  
TRAINING/PROGRAMMING**




**DIVERSIFY FUNDING FOR  
FORUM PROGRAMS, SERVICES,  
AND/OR OPERATIONS**


**STRATEGIC PRIORITY:  
GROW MEMBERSHIP**



**INCLUSIVE MEMBERSHIP**



**MEMBER ENGAGEMENT**



**MEMBER IMPACT AND  
OUTCOMES**

**STRATEGIC PRIORITY:  
IMPACT ACADEMIA**



**EXPAND TO  
SECONDARY EDUCATION**



**REIMAGINE  
EDUCATION ABROAD**



**GLOBAL CITIZENS**



**EDUCATION ABROAD  
IN ACADEMICS**

# VISION SNAPSHOTS

**BIG** THINK BIG  
BY 2025, we will see...



### INCLUSIVE MEMBERSHIP

Inclusive membership from a diversity of organizations and individuals



### MUST-HAVE TRAINING / PROGRAMMING

We have a variety of training programs, resources and events that stretch beyond the Standards of Good Practice.



### REIMAGINE EDUCATION ABROAD

Forum will have played a major role in guiding and facilitating the reemergence of global education



### MEMBER ENGAGEMENT

All Forum members (institutions and individuals) have engaged with a Forum event or program



### INTERNATIONAL EXPERT

The Forum on Education Abroad is recognized as an international expert and is recognized globally as THE standards setting body in education abroad.



### EDUCATION ABROAD IN ACADEMICS

Education Abroad has made a demonstrated contribution to student learning goals and outcomes in such a significant way that education abroad has been integrated to every academic major.



### MISSION-ALIGNED PARTNERSHIPS

The Forum will have developed partnerships with mission-aligned organizations within the field and outside.



### GLOBAL CITIZENS

The Forum has developed a strategy and framework for including issues of equity, diversity and inclusion and the recognition of the roles that power and privilege play into intercultural learning that informs global citizenship – including a set of suggested attributes, skills, outlooks that define/suggest what it means to be a global citizen.



### DIVERSIFY FUNDING

The Forum has new sources of funding and revenue, thus enabling a larger percentage of member fees to be focused on creating benefits/resources that focus on members' successes and engagement which will create pathways for underrepresented groups and members of all kinds.



### MEMBER IMPACT AND OUTCOMES

Members can articulate the value of Forum services and resources that help them to achieve their organizational/institutional goals.










### WIDELY CITED RESEARCH

We are regularly sought out to collaborate on new research projects and our research is widely cited by educators, the media, and other internal and external audiences.











### EXPAND TO SECONDARY EDUCATION

The Forum has expanded its reach beyond post-secondary to serve secondary education abroad

				
 <p><b>INTERNATIONAL EXPERT</b> The Forum on Education Abroad is recognized as an international expert and is recognized globally as THE standards setting body in education abroad.</p>	<ul style="list-style-type: none"> <li>We have named the entities of The Forum that we would like to be more represented. (For example, CCID - Community Colleges for International Development UNCF - United Negro College Fund, ACA - Appalachian Colleges Association, HACU - Hispanic American Colleges and Universities, Department of State - Study Abroad Division)</li> <li>The Forum has chosen a world region to establish itself as an expert.”</li> </ul>	<ul style="list-style-type: none"> <li>Authoritative standard setting bodies in major regions of the world reference and recognize The Forum as the standard setting body for global educational practice and quality.</li> </ul>	<ul style="list-style-type: none"> <li>Number and depth of partnerships (breadth and depth)</li> <li>List of those bodies provided to membership and codified affirmation of Forum's pre-eminence in standard setting in the United States and around the world.</li> </ul>	<ul style="list-style-type: none"> <li>Assess partnerships that would be more productive for depth for long term resonance and impact</li> <li>Reach out to relevant organizations</li> <li>Explore online digital media publications and partners</li> <li>Focus on 1 to 2 regions first</li> <li>Pursue registry with additional relevant governmental entities</li> <li>Pursue registry with department of education in addition to department of commerce</li> <li>Forum will identify beyond the US borders standard setting bodies with whom it would build relationships with a view to becoming recognized as the standard setting organization for that body.</li> <li>Increase bandwidth for ability to host conferences, professional development beyond Western Europe</li> <li>Identify new opportunities in the Global South</li> <li>Develop a saturation campaign around that message.</li> </ul>
 <p><b>WIDELY CITED RESEARCH</b> We are regularly sought out to collaborate on new research projects and our research is widely cited by educators, the media, and other internal and external audiences.</p>	<ul style="list-style-type: none"> <li>Digital catalog of current relevant work curated and shared with membership and study abroad community</li> </ul>	<ul style="list-style-type: none"> <li>We have identified our target internal and external audiences</li> <li>Identify and conduct research projects in collaboration with complementary organizations</li> </ul>	<ul style="list-style-type: none"> <li>Number of citations of Forum research has increased exponentially across a wide range of quality journals and publications.</li> <li>Number of Forum references by major media channels around the world as an authoritative research driven organization.</li> <li>Increased readership of Frontiers, based on number of views of the article on the website</li> <li>Inclusion of Frontiers in additional indices and databases for scholarly work</li> <li>Number of Earned Media Impressions</li> </ul>	<ul style="list-style-type: none"> <li>Re-affirm work already done in the research area and remind global community.</li> <li>Connect current and previous work done by The Forum and share with standard setting organization identified as the focus for standard setting in the first year.</li> <li>Identify under-researched areas in the field</li> </ul>



 <b>Think Big</b>	 <b>Start Small</b>	 <b>Scale Fast</b>	 <b>Headline Indicators</b>	 <b>Critical Initiatives</b>
 <p><b>INCLUSIVE MEMBERSHIP</b> Inclusive membership from a diversity of organizations and individuals who are engaged with education abroad from the U.S. and around the world</p>	<ul style="list-style-type: none"> <li>We have diversity in our membership and engage them in our board, council, staff, committees and working groups</li> </ul>	<ul style="list-style-type: none"> <li>More diverse members including HBCUs, minority serving institutions, international institutions, community colleges</li> </ul>	<ul style="list-style-type: none"> <li>Diversity of our membership and organization types</li> </ul>	<ul style="list-style-type: none"> <li>Utilize new AMS to collect data on engaged membership - allowing Forum to assess and focus strategic priorities</li> <li>Create and promote resources and events to increase participation by students from diverse backgrounds</li> <li>Once membership data is collected, use it to compare The Forum to other associations' membership</li> </ul>
 <p><b>MEMBER ENGAGEMENT</b> All Forum members (institutions and individuals) have engaged with a Forum event or program by attending a Critical Dialogue, Standards workshop, webinar, training session, or other Forum-sponsored program.</p>	<ul style="list-style-type: none"> <li>We are utilizing data to understand how members are engaged in programming</li> </ul>	<ul style="list-style-type: none"> <li>We use data to increase participation rates for those presently disengaged.</li> </ul>	<ul style="list-style-type: none"> <li>Engagement Data</li> </ul>	<ul style="list-style-type: none"> <li>Identify appropriate methods to collect membership engagement data for both individuals and organizations, to include demographics.</li> <li>Identify and cultivate Forum/brand champions within organizations</li> <li>Track engagement of individuals within organizations to gauge where and how members are connecting with Forum services and programs</li> <li>Utilize new AMS to understand which members are already engaged in programming</li> <li>Implement sets of training that are attractive to diverse 'member types' (individuals and institutions)</li> <li>Set realistic goals for membership engagement over the next several years</li> <li>Identify and remove any unique or structural barriers that may currently prevent any groups of members from participating fully</li> <li>Customize outreach to member organizations that are identified as not participating in Forum programs. In this outreach, emphasize the many values and benefits that come with membership</li> </ul>
 <p><b>MEMBER IMPACT AND OUTCOMES</b> Members can articulate the value of Forum services and resources that help them to achieve their organizational/institutional goals.</p>	<ul style="list-style-type: none"> <li>We have articulated the value of membership as a part of the communication strategy.</li> </ul>	<ul style="list-style-type: none"> <li>Forum members recognize and attribute their organizational success and goal achievement to their membership and routinely incorporate Forum resources.</li> </ul>	<ul style="list-style-type: none"> <li>% of Forum members who cite Forum services and resources as having helped them achieve their goals.</li> </ul>	<ul style="list-style-type: none"> <li>Invest additional resources in Forum consultancies to assess individual member institutions and clarify outcomes for specific organizations</li> <li>Develop common global learning outcomes for education abroad that members can use to assess the outcomes of their programming or initiatives</li> <li>Using existing or newly developed research and resources, suggest a set of best practices in assessment for the field of education abroad</li> </ul>

**BIG** Think Big

**SMALL** Start Small

**SCALE** Scale Fast

**INDICATORS** Headline Indicators

**INITIATIVES** Critical Initiatives



**EXPAND TO SECONDARY EDUCATION**  
The Forum has expanded its reach beyond post-secondary to serve secondary education abroad

- An active partnership with AFS and other relevant associations to bring the *Standards* to secondary education abroad programs.
- Work with CSJET and AFS to introduce the *Standards* of Good Practice to their secondary education members

- We have convened colleagues from other secondary education associations to discuss how to align standards in their context.

- Number of secondary education organizations that have become Forum members
- Number of secondary education organizations that are participating in Forum programming and/or utilizing the Standards of Good Practice

- Seek to collaborate with CSJET and AFS to promote the *Standards* to their secondary education membership.
- Invite targeted secondary education organizations to become members.



**GLOBAL CITIZENS**  
The Forum has developed a strategy and framework for including issues of equity, diversity and inclusion and the recognition of the roles that power and privilege play into intercultural learning that informs global citizenship – including a set of suggested attributes, skills, outlooks that define/suggest what it means to be a global citizen.

- We are in collaboration with AAC&U to articulate global learning objectives that promote global citizenship.

- Forum Guidelines for Global Citizenship have been developed and disseminated
- New workshops or other programming have been developed around these new guidelines

- Guidelines have been drafted and are being utilized by numerous Forum members
- The Forum has been invited to present on the new guidelines at other conferences or events

- Identify other associations that articulate global learning objectives that promote global citizenship
- Collaborate with experts to develop guidelines for global citizenship that are specifically created for education abroad programming



**REIMAGINE EDUCATION ABROAD**  
The Forum will play a major role in guiding and facilitating the reemergence of global education by convening the profession to reimagine study abroad in a way that creates the best experience for students and does so inclusively and is environmentally responsible.

- We have discussed the evolving condition and future of education abroad at The Forum Annual Conference and European Conference.
- Add new Critical Dialogues on Environmental Sustainability and disseminate new Guidelines

- Faculty are engaged on the topic of education abroad curriculum integration starting with Forum members who have experience with it.
- Use The Forum's Annual Conference, European Conference, and other events (Critical Dialogues, Institutes, webinars) to disseminate and develop guidance on using education abroad to teach students about climate change and to discuss the impact of education abroad upon the environment

- Number of sessions or events focused on reimagining education abroad
- Amount of member engagement on programming or resources on relevant topics
- % of annual membership renewals

- Add the topic as a virtual Critical Dialogue
- Number of guidelines and other resources produced











**EDUCATION ABROAD IN ACADEMICS**  
Education Abroad has made a demonstrated contribution to student learning goals and outcomes in such a significant way that education abroad has been integrated to every academic major.

- Collaborate with AAC&U and others to articulate learning objectives for education abroad that can be utilized in various program models and academic subjects

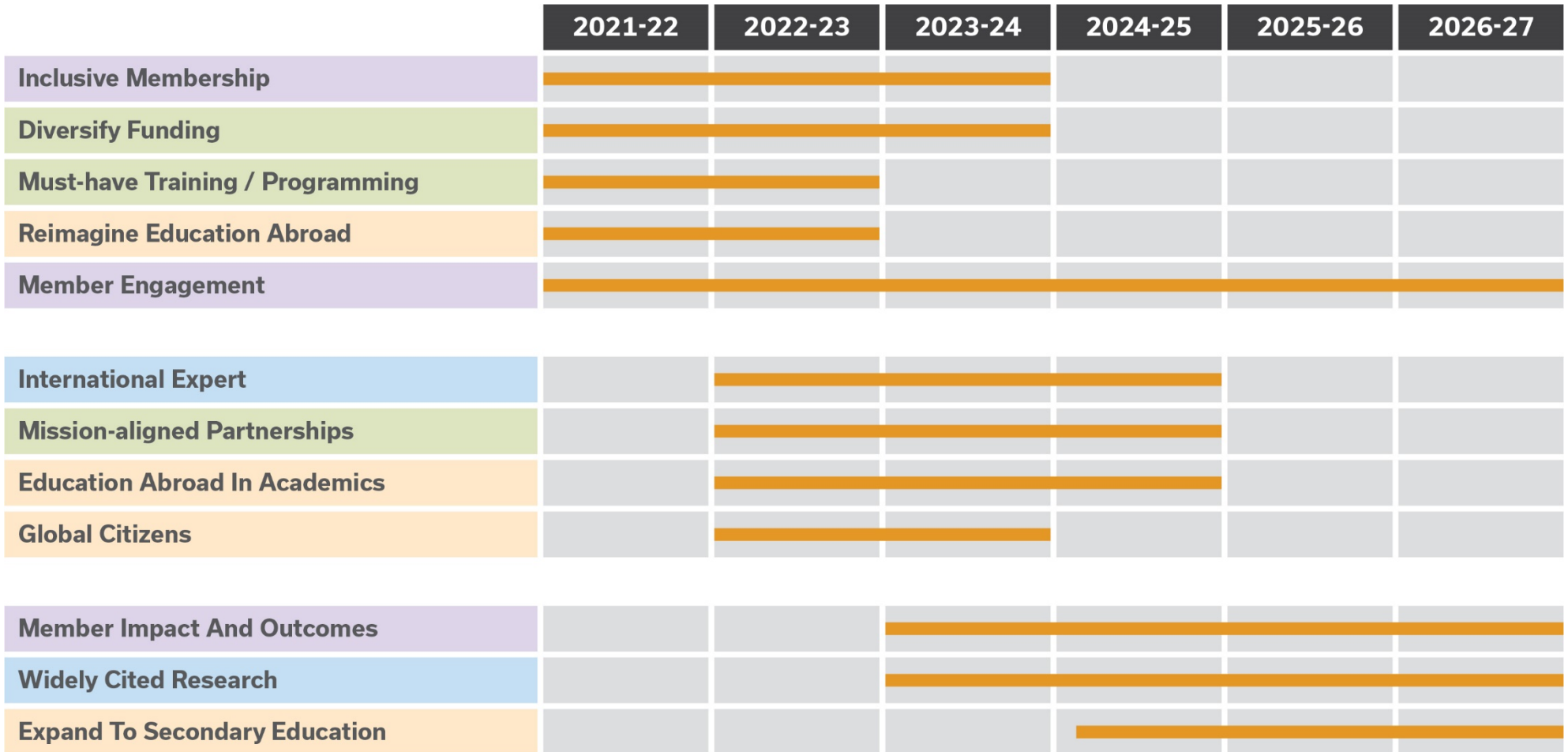
- Both The Forum and AAC&U disseminate these learning objectives to their respective memberships.

- Number of participants at a newly created Critical Dialogue on this topic
- Responses from members to sessions and virtual critical dialogue related to this theme, as gathered through audience evaluations.

- Develop and host a Virtual Critical Dialogue on this theme and encourage faculty at member institutions to attend.
- Invite session proposals for both organization's conferences that focus on these learning objectives.

 <b>Think Big</b>	 <b>Start Small</b>	 <b>Scale Fast</b>	 <b>Headline Indicators</b>	 <b>Critical Initiatives</b>
 <p><b>MISSION -ALIGNED PARTNERSHIPS</b> By 2025, The Forum will have developed partnerships with mission-aligned organizations within the field and outside. The partnerships will support collaboration and maximize the impact of both organizations' contribution to the field.</p>	<ul style="list-style-type: none"> <li>List of joint research / expanded membership existing and potential partners</li> </ul>	<ul style="list-style-type: none"> <li>Forum has multiple partners that fill in gaps or expand the impact of Forum resources and programs</li> <li>Forum's partnerships span geographic regions</li> <li>Deeper partnerships result in more projects/resources with the same entity</li> <li>Forum's partnerships span new sectors and interest groups that share its mission, vision and values (e.g. secondary education exchange, graduate and professional exchanges, etc.)</li> <li>Focus on strategic, robust partnerships that result in more projects/resources with the same entity</li> </ul>	<ul style="list-style-type: none"> <li>Number and effectiveness of strategic programs and resources that result from the collaboration of partners</li> </ul>	<ul style="list-style-type: none"> <li>Understand objectives of each existing or potential partner (joint research, expanded membership)</li> <li>Identify organizations with whom we might partner outside the US</li> <li>Set goals for each partnership</li> <li>Develop a map of existing forum partnerships, their purpose, and their success.</li> <li>Identify gaps in the partnership map and locate target organizations to fill those gaps (e.g. to partner on joint research or to help The Forum expand its reach)</li> </ul>
 <p><b>MU ST-HAVE TRAINING/P ROGRAMMING</b> We have a variety of training programs, resources and events that stretch beyond the Standards of Good Practice. Our programs are viewed as a "must have" for professional development of early- and mid-career professionals and for experienced professionals to stay abreast of emerging trends and research.</p>	<ul style="list-style-type: none"> <li>We have new workshops and professional development offerings.</li> </ul>	<ul style="list-style-type: none"> <li>The Forum has a robust suite of professional development offerings for education abroad professionals.</li> </ul>	<ul style="list-style-type: none"> <li>% of training opportunities that cover early, mid, and senior professionals in the field</li> </ul>	<ul style="list-style-type: none"> <li>Consider, design and develop a shadowing/mentoring program for early and mid-career professionals (could be short time, 2-3 days) across Forum member institutions</li> <li>Implement actions recommended by Mid-Career Working Group</li> <li>Prioritize workshops that need to be refreshed or created</li> <li>Marketing/Comm plan to engage early and mid-career folks</li> <li>Utilize program alumni to market to their peers and/or own teams to encourage participation</li> <li>Provide marketing tools to IR's and other stakeholders to help them market Forum programs and events</li> <li>Consider strategies to make Forum resources more affordable to a variety of individuals at member institutions</li> <li>Utilize virtual platforms to reach more member participants even after face to face is possible</li> <li>Evaluate past conference content, speakers and trainers and leverage for new workshop content.</li> </ul>
 <p><b>DIVERSIFY FUNDING FOR FORUM PROGRAMS, SERVICES, AND/OR OPERATIONS</b> The Forum has new sources of funding and revenue, thus enabling a larger percentage of member fees to be focused on creating benefits/resources that focus on members' successes and engagement which will create pathways for underrepresented groups and members of all kinds.</p>	<ul style="list-style-type: none"> <li>We have evaluated our current funding portfolio mix and are exploring new ideas for further funding growth.</li> </ul>	<ul style="list-style-type: none"> <li>Develop and test new revenue streams</li> <li>We have identified and pursued 3 revenue streams and funding sources.</li> </ul>	<ul style="list-style-type: none"> <li>% of operations externally funded</li> <li>Total funding</li> <li>% of funding from new sources</li> </ul>	<ul style="list-style-type: none"> <li>Develop feasibility study to determine new opportunities, resources required, etc.</li> </ul>

# IMPLEMENTATION TIMELINE



Questions?  
Thank you!

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