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A Phenomenological Study: A Pre-departure Study Abroad Course Interrupted by the COVID-19 Outbreak

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ABSTRACT

The original plan of this research was to collect multiple sets of data from business students in a 2020 spring study abroad program including the pre-departure course, the experiential learning in Thailand and post experience. When the World Health Organization (2020c) categorized the COVID-19 outbreak a pandemic, the pre-departure course was interrupted, resulting in the remaining sections of the program to be cancelled. To date, since no previous research was available on a pre-departure course interrupted by a pandemic of this kind, the experiences of the two faculty members teaching the course became central to the research making this study phenomenological. The experiences were captured by daily notes with reflections leading to four key findings: 1. The course lacked skills training and needed to be redesigned as it would be offered in spring 2021. Adding practical applications to the comprehensive collection of materials would lead students to start shifting their mindsets prior to the trip rather than during the trip resulting in maximized experiences. 2. The COVID-19 outbreak was unprecedented in that it was not a short-lived occurrence but an on-going crisis. The uniqueness of the situation brought futuristic thinking and scenario planning to the forefront when developing and implementing such global programs. 3. Faculty were not prepared for an on-going crisis. To be able to cope with similar uncertainties and act decisively, faculty leading such experiences needed training in futuristic thinking and scenario planning. 4. Faculty country-expertise strengthened student trust when teaching the course. Developing, teaching such courses, and leading such experiences need to be backed up by location-expertise to foster confidence for optimal benefits.

Keywords: Pandemic; Pre-departure study abroad course; Scenario planning; 2020 Covid-19 Outbreak.

SETTING OF THE STUDY

Following the decision to categorize the COVID-19 outbreak as a pandemic by the World Health Organization ([WHO], 2020c) on March 11, 2020, the original research plan of this study had to be altered. Previously, the intent was to collect data from business students throughout a 2020 spring semester-study abroad program including the pre-departure study abroad course and the faculty-led study abroad trip designed for Thailand and post experience. To date, there was no previous research available on a pre-departure course interrupted by a pandemic of this kind, the experiences of the two faculty members teaching the course became central to the research As a result, the research shifted from a mixed method study to a phenomenological study. Both the original and the current research were presented in the following section as certain sections of the original research carried over to the current research.

Original Study

Originally, the purpose of the study was to explore and explain the attitudes of the six business students in a faculty-led study abroad program. The intent was to collect both qualitative and quantitative data from the students throughout the program in three contexts: During the pre-departure course at their university, a state university in the Midwest; during their experiential learning in Thailand; and finally, upon completing the experience. The two faculty members teaching the course, leading the trip, and acting as the researchers for the study would also journal their lived experiences, perceptions and observations to assess and evaluate the program, particularly, starting with the course, which aimed to prepare the students for experiential learning.

The significance of the topic for the original study had derived from research findings on developing skills such as empathy and intercultural communication competencies through experiential learning. Since empathy was declining among college students (Konrath, O'Brien, & Hsing, 2011) designing effective study abroad programs with experiential learning was fundamental and the researchers had planned to explore and explain student attitudes throughout the program. Regarding empathy "aside from volunteerism and charitable donations, other societal trends support the claim that empathy is declining" (Konrath, O'Brien, & Hsing, 2011, p. 188). Therefore, it was fundamental to design and develop study abroad programs "favoring the learning attitudes and the means of bringing about changes in attitudes" (Gagne, Briggs, & Wager, 1992, p. 87) by means of experiential learning. The study had planned to use the Experiential Learning Theory (ELT) defined by Kolb (1984) as "the process whereby knowledge is created through the transformation of experience. Knowledge results from the combination of grasping and transforming experience"(p. 41).

Based on the multitude of benefits ranging from the developing cross-cultural competencies to the improvement of *cognitive empathy* (Perlmutter, 2020, p. 72), a five-phased study abroad plan was developed by faculty members. The first phase was the *Program Planning* and covered two field trips to Thailand in 2018 and 2019 by faculty due to his expertise. This phase included planning a field protocol from assessing risks and challenges, obtaining permissions to how students would immerse in daily life and designing each experiential learning activity. In addition, video, and photo

ethnography (Pink, 2013) enabled the faculty to document life in Thailand and collect artifacts to provide insights for the pre-departure study abroad course. The second phase was the *Designing and Developing a Pre-departure Study Abroad Course* and was based on the findings of the two field trips and aimed to effectively prepare students for the experience. The first two phases of the plan had already been completed (Ward, Dalat Ward, & Jones, 2019; 2020). The third phase was the *Teaching of the Pre-departure Study Abroad Course* as a requirement to the trip but was interrupted by the pandemic which led to the changes. As planned, the pre-departure course was implemented on February 29, 2020 and was taught on campus, face-to-face by two faculty members. At this point, the Covid-19 outbreak had already spread from China to Italy and was continuing to affect other countries.

The intent of the course was to meet with the students for a total of four times prior to the trip and expose students to the culture of the country and logistics of the trip. Many of the videos, photos, forms related to the trip were available on Blackboard, the official learning management system of the university. The second face-to-face meeting was completed on March 7, 2020. However, when the COVID-19 outbreak was "categorized as a pandemic" on March 11, 2020 (WHO, 2020c, "WHO characterizes COVID-19 as a pandemic" section), the campus was shut down and all classes were suspended for safety reasons. The remaining sessions of the course was cancelled to be offered again in spring 2021. The fourth phase, *Faculty-led Trip to Thailand,* planned for May 2020, had to be cancelled as well, and the fifth phase, the *Post-trip*, which would evaluate and assess the transformation of the students upon returning to the U.S., also became obsolete.

When the awareness of the pandemic became prominent, the two faculty members, who had been the researchers, decided to shift the focus of the study to their own experiences omitting the students as participants. The principal researcher, a country expert, had already been reporting his experiences related to "program planning" since mid-December 2019, and continued to do so. The second faculty member, co-planning and co-teaching the course, had also been reporting his experiences since mid-February 2020. The experiences of the two faculty members made up the current study as teaching during an outbreak was significant due to no available research to date.

Current Study

Based on the decision to postpone the study abroad program, the literature review, and the methodology of the study shifted from students to faculty experiences. The central research question became: What were the experiences of the two faculty members teaching a pre-departure course during the COVID-19 outbreak? The phenomenological design was selected as the two faculty members captured their "perceptions, feelings and lived experiences" (Guest, MacQueen, & Namey, 2012, p.13) during the pandemic.

The significance of the current research derived from two sources: Faculty experiencing an outbreak turning into a pandemic during the teaching of a pre-departure course as part of a faculty-led study abroad program to Thailand; and the *unanticipated consequences* (Patton, 2015, p. 9) of the outbreak as it interrupted the course. There was no previous literature available to date on the unique situation of a pandemic interrupting a study abroad course. Furthermore, although ample empirical research on student outcomes in study abroad programs was available, particularly in the recent years, there was limited literature on faculty experience when it came to leading study abroad programs (Goode, 2007; Ingram, 2014). While Goode described faculty roles in faculty-led

study abroad trips, Ingram explored faculty perspectives regarding study abroad as well as global studies education.

Data on faculty experiences were collected from the two faculty members by means of notes to selves and reflections on these notes. The two faculty members acted as researchers and upon data collection, a third researcher joined the team to analyze the data. Once the raw data were reduced into a more useful form, the analyses were completed in two segments including experiences regarding the teaching of the course prior to the pandemic; and experiences regarding the pandemic interrupting the course.

REVIEW OF LITERATURE

There were limited studies on faculty experiences regarding study abroad programs, and there was no research reported on the interruption of a pandemic on a study abroad course. However, to put this study into perspective, it was important to present the existing literature on study abroad in the following four contexts. The *historical context* presented study abroad emerging from the Cold War era as part of cultural diplomacy. The *educational context* presented study abroad as supporting student experiences as well as the role of faculty experience. The *pre-departure preparedness context* presented the significance of readiness related to faculty teaching, planning and leading study abroad programs with an aim of immersing students in experiential learning. Finally, the *risk management context* emphasized the importance of university-wide international risk management plans to effectively manage the *unanticipated consequences* (Patton, 2015) by means of a PESTLE (political, economic, social, technological, legal, environmental) Analysis (PESTLE, n.d.).

Historical Context

Study abroad must be viewed in the context of world history, and animosity between Russia and the United States and the cold war era. As early as 1947, research focused on the use of culture as propaganda, summarizing government investment in culture in Germany as the preservations of Germanism; Japan as the racial approach; and the USSR as the cultural approach (McMurry & Lee, 1947). As stated by McMurray and Lee, "In summary, we may say that the peoples throughout the world seem agreed upon the importance of mobilizing those forces on which give promise of building trust and confidence among the nations….based on truth and the presentation of facts" (p. 247).

Two cultural programs directly emerged from post Second World War, both funded by the United States government. The first one, the Fulbright exchange program, was established in 1946 under the Truman administration; and the second one, the United States Information Agency (USIA), was established in 1953 during the Eisenhower administration (Cull, 2008). The USIA was assigned to promote US interests via culture, exchange, programming and communication (Cull, 2008). As part of *cultural diplomacy*, the programs were defined as "the managed export of culture," and were a direct response to the cold war between and 'West' and the Soviet Union" (Cull, 2012, p. x). Within this context the desire to influence other nation's political and economic directions involved soft power, as noted by Hayden (2020) "The soft power concept describes how states may turn to their soft power resources (culture, values and foreign policy legitimacy" (p. 223). Following these years, international organizations for most nations learned that "in order to work together in rebuilding a devastated world they must develop means better to understand one another's purpose"

(McMurray & Lee, 1947, p. 230). It is within this historic atmosphere from which study abroad emerged.

Educational Context

Study abroad experiences can promote "*cognitive empathy,* also known as 'theory of mind' or 'perspective taking'…. the ability to see things from the perspective of another-to understand the motives of others and to be consciously aware of their thoughts, intentions and desires" (Perlmutter, 2020, p. 72). Well-designed study abroad programs can change attitudes (Gagne, Briggs, & Wager, 1992) by means of experiential learning defined by Kolb (1984) as "the process whereby knowledge is created through the transformation of experience. Knowledge results from the combination of grasping and transforming experience" (p. 41).

Students benefit most from these experiences when they are immersed into meaningful educational activities outside of their comfort zones. Although in general, with or without faculty, such programs have been around for some time, the recognition of the effects on student transformations has been reported within the last decade as noted by Whalen (2015) "study abroad has a long past but a short history" (p. x).

The earliest evidence of "cultural relations abroad," dated back to after the First World War (McMurray & Lee, 1947), and was intended to be more political than educational due to the aftermath of the war. The first reported study abroad program at a university was in 1923 and was organized by a professor at the University of Delaware (UDEL) for juniors to sail to France to study for one year (UDEL, n.d. para. 5). This was considered a "daring plan" (UDEL, para 1.). However, the university cancelled the program in 1948, three years after the surrender of Germany, because of post war conditions and a new university president "who felt that study abroad was not a priority" (UDEL, para.7).

Today, such educational and cultural exchange programs also exist as part of the U.S. State Department branch of the Bureau of Educational and Cultural Affairs ([ECA], n.d.) and continue to support the mission to "increase mutual understanding between the people of the United States and the people of other countries by means of educational and cultural exchange that assist in the development of peaceful relations" ("Study Abroad in High School with the U.S. Department of State" section, para.1).

In higher education institutions, such programs are known in various terms such as study abroad, education abroad, study away, global education and transnational education. Considered an integral part of student development, these programs are planned and designed in a myriad of configurations. More importantly, such programs are viewed as investments for students and parents as such global experiences lead to massive transformations, particularly acquiring countless competencies related to intercultural communication (Whalen, 2015). In fact, high schools have already adapted these global experiences to better prepare students for future opportunities. One such program offered by ECA (n.d.) is the *Academic Year Study Abroad Scholarship* for high school students and promotes "global competitiveness and cross-cultural understanding" (para.1).

Faculty-led Programs

When designed well, faculty-led study abroad programs can have a massive impact not only on students but also on faculty, transforming all parties: "international exchange is a mechanism for creating 'switches' taking someone from a network of which you are not a member, inducting them into one's own network, and empowering them to speak credibly to their old network on behalf of their own" (Cull, 2019, p. 82). In international contexts, faculty can find themselves acting as adult learners, processing six core adult learning principles (Knowles, 1973) one of which concerns faculty's prior knowledge and experience. Among many benefits, the experiences of teaching and/or leading study abroad programs can result in improved and more effective pre-departure study abroad courses as well as in-country experiences.

There is empirical data on roles of faculty when it comes to leading these trips. One study explored faculty roles and re-affirmed the previous findings (O'Neal, 1995; Rasch, 2001) described as: "multifaceted with a wide range of aspects and dimensions" (Goode, 2008, p. 154). Moreover, faculty roles were identified in the categories of logistical, intercultural and academic. Faculty were able to act as leaders, physically accompanying students on trips by "applying technical and coaching interventions…. [which] can strengthen students facing the demands of international experiences" (Davis & Spoljoric, 2019, p. 314). However, research on faculty experiences regarding study abroad is limited (Ingram, 2014). Furthermore, to date, studies on faculty experiences regarding teaching a pre-departure course and the *unanticipated consequences* (Patton, 2015) of a pandemic interrupting the teaching does not yet exist at the time of this writing.

Experiential learning is defined as "making meaning out of direct experiences in academic, personal, and/or professional terms" (Drolet, 2013, p. 185). For learners, an experience provides a process "to apply and to integrate their knowledge and skills in the field while challenging their values…" (p.185). Furthermore, adding reflexivity to the experience involves another level of "an on-going conversation about experience while simultaneously living in the moment" (Hertz, 1997, p.viii).

When experiences are supplemented with reflexivity, "it is meant to direct us to a particular kind of reflection grounded in the in-depth, experiential, and interpersonal nature of qualitative inquiry" (Patton, 2015, p. 70). Taggert and Wilson (2005) outline *50 action strategies* to promote reflective thinking in teachers and posit three levels of reflection: 1) The technical level of referring to past experiences; 2) a contextual level that examines alternatives, choices based on knowledge and value; and 3) dialectical choices that address moral, ethical and/or sociological issues (p. 4). Moreover, reflection has a cyclical approach as argued by Dewey (1933) and Schön (1983). In fact, Taggert and Wilson identified five steps in the cyclical process: 1) context problem identification; 2) problem framing through observation, reflections, data gathering, moral judgements, context and schema; 3) possible solutions; 4) experimentation; and 5) evaluation leading to acceptance or to a return to the original problem.

As an early proponent of the power of reflection in classroom instruction, Dewey (1944) focused on the role of reflection in student learning in the classroom and defined education as a "reconstruction or reorganization of experience which adds to the meaning of experience and which increases the ability direct the course of the experience" (p. 74). Additionally, according to interpretation of Rodgers (2002) Dewey considered reflection as a meaning-making systematic,

rigorous, disciplined process that occurs in interaction with others: "Because reflection is a defined as a way of thinking, it can be practiced, assessed and perfected" (Rodgers, p. 864). Furthermore, the experience itself requires interaction with "the self and other people, the material world, the natural world, an idea, or what whatever constitutes the environment at hand" (Rodgers, p. 846). According to Rodgers "Dewey essentially defines education as a verb and not a noun" (p. 846), and summarizes Dewey's concept of reflection in four criteria:

1) Reflection is a meaning-making process that moves a learner from one
experience into the next with deeper understanding of its relationship with and connections to other experiences and ideas. 2) Reflection is a systematic, rigorous, disciplined way of thinking, with its roots in scientific inquiry. 3) Reflection happens in a community via interaction with others. 4) Attitudes of personal and intellectual grown must be valued. (p. 845)

Pre-Departure Preparedness

Implementing a comprehensive faculty-led pre-departure study abroad course prior to leading and immersing students in an array of experiences has a multitude of benefits. Such courses vary in content, but the foci remain similar in that students are prepared for the new culture and new experiences of the country to be visited.

There is ample research regarding implementing effective pre-departure study abroad courses. As stated by Holmes, Bavieri, and Gannasin (2015) "pre-departure material can help students recognize variety and complexity in self and the other in intercultural encounters in self and others" (p. 16). Such materials can also be effective as students can be "guided thorough learning tasks based on Kolb's phases of experiential learning, analysis, and critical reflection" (p. 18). In such courses the pre-departure socialization aspect as part of the learning process can also be crucial. According to Spencer and Olmos (2017) "student preparedness for work and study abroad programmes, in themselves significant transition and transformative experiences, is enhanced when students are more consciously engaged in concerted efforts to initiate and reflect on their own learning and behaviours prior to SA experiences" (p. 1). Furthermore, Hagar (2014) investigated a virtual pre-departure orientation that promoted intercultural learning and established best practices for online learning and stated that: "It is vital that these pre-departure orientation programs lay the groundwork for mutual understanding by fostering intercultural sensitivity and developing intercultural competence" (p. 3). Additionally, Wojenski (2014) examined online learning as a pre-departure tool through a collaborative online international learning for the U.S. students going abroad and for the international students coming to the U.S. There students were together for a six-week collaborative seminar.

Risk Management

Study abroad programs come with many risks and challenges, and push universities to continually develop policies and protocols to manage risks involved with travel and safe study abroad experiences.

In the last decade, while the world experienced a multitude of political, economic, social, technological, legal and environmental crises and risks, unlike most private organizations, most universities were slow to improve their risk management plans. As indicated at an interview with Nick Vasquez, the international travel and security manager at William & Mary University,

conducted by West (2020), very few universities have international risk managers: "there are about 120 people [serving as] international risk managers at 90 universities" (pp. 2-3). While institutions develop plans, and/or recruit risk managers and/or risk management teams, the thinking of stakeholders needs to be stretched continuously to be agile facing crises. According to Nohria (2020) "in the complex and uncertain environment of a sustained, evolving crisis, the most robust organizations will not be those that simply have plans in place but those that have continuing sensing and response capabilities" (p. 130).

The danger of lack of a comprehensive international risk management plan affects not only study abroad program leaders and faculty leading these programs but also endangers faculty conducting research in other countries. Ice, Dufour and Stevens (2015) also discuss situations where researchers knowingly take risks when they enter in "dangerous field encounters because they do not yet grasp fully the situation or the cultural contexts" (pp. 134-135).

When it comes to *risk management* of study abroad programs, the responsibility falls under the role description of the *Senior International Officer* as part of *International Expertise* of the position description based on Association of International Education Leaders ([AIEA], n.d.). As part of the *Standards of Professional Practice for International Education Leaders* (*Standard Three* states: "[International Education Leader] has an appreciation for the risks associated with global engagement for the institution and its faculty, staff and students, and works closely with relevant others to minimize risk" (AIEA, para. 3).

While it is essential to have a university-wide comprehensive plan in place, it is equally crucial to "think carefully about the future in order to plan and provide updated training based on trends and anything, from individual actions to the grand strategies of complex organizations" (Alexander, 2020, p. 13). Thinking about the future requires regular forecasting exercises as conducted in business for decades. According to Chambers, Mullick, & Smith (1971) business forecasting includes responses to the following three questions: "What is the purpose of the forecast and how is it to be used?....What are the dynamics and components of the system for which the forecast will be made?...How important is the past in estimating the future?" (pp. 3-6).

Similar to business practices, Alexander (2020) describes the intention of forecasting in higher education as *trend analysis* and *scenario creation* which "is to combine their respective strengths in order to generate the richest and most useful map of higher education's future" (p. 13). Creating, using and assessing scenarios for possible international risks (Chermack, 2011) can play an important role in forecasting in higher education as "they teach us to think in new ways" (Alexander, 2020, p. 22).

Most study abroad program leaders follow the U.S. State Department protocols (U.S. Department of State, n.d.) which dictate the ground rules for international travel as *alerts* or *warnings* depending on the type and level of the crisis and the risk. For example, while each influenza season brings threats to international communities resulting in an increase in the number of deaths, to date, such outbreaks did not prevent study abroad programs (Barry, 2018). Rather than being categorized as a pandemic, influenza, with the exceptions of the 1918, 1957, 1968, was only handled in a cautionary manner placing the responsibility on the study abroad leader and/or parents and/or faculty travelling with the students. Anecdotal data which circulate among study

abroad leaders indicate that each influenza season generates health challenges but, these cases are viewed as not posing a threat for students in study abroad programs (Y. Dalat Ward, personal communication, March 5, 2020). In addition, to date, no studies have reported such setbacks until the 2020 pandemic.

As leaders and civilians alike, in addition to considering the political, economic, social, technological, legal and environmental (PESTLE) factors, it is utmost important to rethink the global health threats as a separate category. The early signs of the outbreak and the globalized world order clearly demonstrated that the PESTLE factors needed to be re-framed as *PHESTLE* factors (political, health, economic, social, technological, legal and environmental) with a new category "H" representing global health risks, creating a new world order (Dalat Ward, 2020).

As demonstrated throughout the history of epidemiology, due to a globalized world order, these health risks are prone to quickly turn into "a global disease outbreak" affecting "a wider geographical area, often worldwide" (Association of Professional in Infection Control and Epidemiology [APIC], 2020, What is an Outbreak section, para. 1). When the COVID-19 outbreak became a global risk in December 2019, it was only declared a pandemic on March 11, 2020 (WHO, 2020d). During the first signs of the outbreak, the global domino effects had already begun, making it too difficult to prevent and control the spread of the disease. When an outbreak starts to affect a wider population and is classified as a pandemic (APIC, WHO, 2020b), it can lead to *unanticipated consequences* in education including worldwide cancellation of programs, economic setbacks, campus shutdowns and border closings. There is a multitude of lessons to be learned when it comes to agility.

Improving risk management plans of institutions requires going beyond analyzing the *PHESTLE* factors when confronted with crises. Leaders must assume the role of both scenario planners and futuristic thinkers. Both roles, scenario planner and futuristic thinker, promote *response capabilities* (Nohria, 2020). These capabilities range from multi-disciplinary group thinking to stretched thinking (thinking out of the box in different ways) and is also crucial when developing strategic plans as a futurist (Webb, 2020). This is particularly true when a crisis is characterized as having a "rapid spread" (Hickok, 2020), such as this pandemic, and require agile thinking and acting.

METHODOLOGY

Background of Researchers

With the *unanticipated consequences* (Patton, 2015) of the pandemic, the purpose of the research shifted to exploring the experiences of the two faculty members teaching a pre-departure study abroad course. The two faculty members who taught in the college of business also acted as researchers. The principal researcher had worked as an experienced cultural diplomat in the United States Information Agency (USIA). In addition, he had lived and worked in Thailand for many years and knew the country well with an extensive network of colleagues and friends. As the researcher defined the objective, organization and the content of the experiential learning in Thailand while visiting the country in December 2019, his experience reporting started mid-December 2019. The second researcher was experienced in the field of marketing and had international exchange experience and developed the final module of the pre-departure study abroad course which concerned marketing basics, Thai consumers, product distribution, and the

impact of culture on marketing. The plan was for students to observe agricultural products grown at the Royal Agricultural Property in Thailand and the distribution system through warehouses and into markets. Since the pandemic affected both faculty members, it was essential to include experiences of both members. The third researcher joined the team during the data collection and analyses phase bringing linguistics and research experience to the study.

Phenomenological Design

A phenomenological design was selected for this study as the focus was on the "subjective human experience" of the two faculty members and responded to the following core question "what is the meaning, structure, and essence of the lived experience of this phenomenon for this person or group of people" (Patton, 2015, p. 98); and summarized the "participants perceptions, feelings, and lived experiences that are paramount and that are the object of study (Guest, MacQueen, & Namey, 2012, p. 13).

Data Collection

Raw data included two researchers' notes presenting experiences with reflections. These notes were based on what the researchers experienced, observed and believed "to be worth noting [and were] detailed, concrete and descriptive" (Patton, 2015, p. 387). Following the experiences, the researchers also added their reflections. The experiences of one faculty member covered a six-month period from December 2019 until mid-June 2020, and the experiences of the second researcher covered the period from February 2020 to mid-June 2020. The data were categorized and analyzed in two segments including the two face-to-face class sessions conducted by the two faculty prior to the pandemic; and the pandemic as it interrupted the teaching of the course. The qualitative analysis of these lived experiences provided rich data on the insights of teaching a course prior to the outbreak declared a pandemic and during the pandemic.

Data Analysis

Once the data were collected, a third faculty member, who had extensive experience in coding and themeing data, joined the team to analyze the data in two segments including experiences during the outbreak and the experiences following the declaration of the outbreak a pandemic. With the third researcher, through *external audit* and *member-checking* and *validating the findings*, credibility was added to the interpretation of the findings (Creswell & Guetterman, 2019).

Prior to proceeding with the phenomenological data analysis "through methodologies of reduction, the analysis of specific statements and themes, and search for all possible meanings" (Creswell, 1998, p. 52), all three researchers applied the *Questions to Consider Before Analysis* (Guest, MacQueen, & Namey, 2012, pp. 31-34) as indicated below. These questions, taken from *Applied Thematic Analysis* (Guest, MacQueen, & Namey), ensured the researchers to conduct "an efficient and meaningful analysis" (p. 31).

Questions to Consider Before Analysis

1. What is the practical purpose of the analysis?

As described above because the *practical purpose* of the analysis was to evaluate, improve and redesign the pre-departure study abroad course as indicated in Table 1.

Table 1: Pre-departure Study Abroad Course

Week 1 **Module 1:** ***The Thai Culture***	**Learning Objective:** *Students will understand and relate to What is Thainess? and The Role of the King, the Military and Buddhism.* This module is supported with literally hundreds of artifacts from Thailand, ranging from subway tokens to spirit houses and monk robes collected by faculty. The concept of the three-pronged definition of Thai culture originated from the faculty's visit to a Thai history museum in Bangkok.
Week 2 **Module 2:** ***Cross-cultural Communication***	**Learning Objective**: *Students will define and analyze the concepts of the Ladder of Inference and Mental Models as developed by Argyris (1983, 1999) and Senge (1994).* The concepts of the *Ladder of Inference* and *Mental Models* will introduce our thought process and how we make faulty assumptions leading to insensitive actions and beliefs.
Week 3 **Module 3:** ***The Social Enterprise***	**Learning Objective:** *Students will compare/contrast and analyze and evaluate an agricultural project.* Students will stay five days at one of the King of Thailand's Royal Agricultural properties in the mountains of Chiang Mai province. As many on-campus students are from small agricultural rural towns, the site is deemed to be of special interest. This will be the site of maximum student interactions with Thai students as there are a number living and working as interns at the site.
Week 4 **Module 4:** ***Marketing***	**Learning Objective:** *Students will understand and evaluate topics including Marketing basics, Thai consumerism, product distribution, and the impact of culture on marketing.* Students will observe product creation and distribution through the warehouses and into stores.

Note. Based on previous research (Ward, Dalat Ward, & Jones, 2019, 2020). Of the four modules only the first two modules were completed.

The original pre-departure study abroad course was developed for a state university located in the Midwest in the U.S. with an on-campus student enrollment of over 16,500. Majority of the students came from small rural agricultural communities and many students were the first generation in their family to attend university. Majority of on campus students worked to pay rent and university expenses. A foreign language was not required as part of the general studies degree.

A total of six students enrolled in the course including one female and five male students. The majors of the students included Psychology, Agricultural Business and Agronomy, Financial Planning, Organizational Leadership (Honors Student), Agricultural Education (Non-traditional) and Construction Management. Two of the students were graduating seniors and four were juniors and very few had international travel experience.

The course learning objectives were based on Bloom's High Learning Cognitive Taxonomy (1956). The learning would be significantly enhanced through prior, concrete familiarity with the sites, people to be met, and a range of artifacts collected for the course. The course materials were posted in a learning managements system, Blackboard, and was organized into modules including *Predeparture Requirements*, *Thai Culture*, *Cross-cultural Communication*, *Marketing in Thailand* and *Social Enterprise*.

The course was originally planned for four Saturday afternoons for a total of 13 hours as required by the university for a face-to-face one-credit hour course. Because of work and family activities, the course dates were set together with students as four Saturdays for three hours each time in a face-to-face class encouraging interactions. Two instructors led the course. The faculty who acted

as the principal researcher was a specialist in global communication and a subject matter expert on Thailand's history and culture, and the second faculty member, a specialist in marketing. The first class was held on Feb 29, 2020 and the second session was on March 7, 2020. When the students were asked to leave the campus on March 13, 2020 following the outbreak declared a pandemic, faculty had to cancel the last two class sessions as well as the trip.

The predeparture requirements also included links to the State Department's Travel Advisory for Thailand, information on logistics ranging from airport information to required forms related to the country and were grouped under a *Welcome Onboard* section in Blackboard. A daily schedule of activities was also included in the course.

2. What is the analytic purpose?

The *analytic purpose* was to explore the experiences of the two faculty members by means of daily notes with reflections on these notes. As a result of the *unanticipated consequences* of the outbreak, the research was redirected to capture faculty lived experiences transforming the research study from a mixed method approach to a phenomenological study. The emerging themes derived from capturing and *mixing and matching coding* (Saldaña, 2016) of data on experiences which were divided into two sections as the pandemic was central to the research. The faculty experiences were analyzed using the first cycle combination of two or more coding methods by Saldaña including: 1) *In Vivo Coding* (faculty's own words and phrases); 2) *Magnitude Coding (*alphanumeric values); 3) *Evaluation Coding* (merit, worth, significance of the course and program); 4) *Emotion Coding* (emotions of the faculty throughout the experience); and 5) *Values Coding* (faculty values, belief, perspectives, etc.). Second cycle of data analysis consisted of *eclectic coding* and led to identifying themes "at the manifest level (directly observable in the information) [and] at the latent level (underlying the phenomenon)" (Saldaña, p. 297). Using two cycles of coding followed by *Theming the Data* (Saldaña) resulted in interpreting the findings regarded as lessons learned.

3. How is the analysis connected to the research question(s)?

Due to the interruption of the pandemic the central research question became: What were the experiences of the two faculty regarding the teaching of a pre-departure study abroad course? The coding methodologies which led to the emerging themes and eventually findings were influenced and aligned by the central research question focused on faculty experiences (Saldaña, 2016).

4. What is my timeline?

Timeline of the research was of essence due to the impact of the outbreak. Therefore, the researchers acted quickly to start the data analysis. For the principal researcher data collection started mid-December 2019, and for the second researcher mid-February 2020. Recording data for both researchers ended mid-June 2020. The researchers decided to end the data collection as there was no indication of when the outbreak would end.

5. What resources do I have at my disposal?

The two faculty members were active in watching the local and world news and continuing to report their experiences. A third researcher joined the team segmenting and analyzing the raw data by means of *intercoder agreement* (ICA) defined as "intercoder agreement signifies the extent to which two or more data analysts code the same qualitative data set in the same way" (Guest, MacQueen, & Namey, 2012, p. 89). Adding *external audit*, *member checking, validating findings*

(Creswell & Guetterman, 2019) when conducting analysis was essential when it came to credible findings.

6. How large are my data set?

Textual data were collected by the two faculty members teaching the course by means of experiences recorded as daily notes and reflections. The following timeline of events indicated in Table 2 was critical in analyzing the data.

Table 2: Timeline of Events Leading to a Pandemic

December 2019	Chinese authorities treated dozens of cases of pneumonia of unknown cause.
January 2020	• January 11: China reported its first death. • January 20: Other countries, including the United States, confirmed cases. • January 23: Wuhan, a city of more than 11 million, was cut off by the Chinese authorities. • January 30: World Health Organization (WHO, 2020a, 2020b, 2020d) declared a global health emergency. • January 31: The Trump administration restricted travel from China.
February 2020	• February 2: The first coronavirus death was reported outside China. • February 5: A cruise ship in Japan quarantined thousands. • February 7: A Chinese doctor who tried to raise the alarm died. • February 11: The disease the virus causes was named Covid 19. • February 14: France announced the first coronavirus death in Europe. • February 19: Hundreds left the quarantined cruise • February 23: Italy saw a major surge in cases. • February 24: Iran emerged as a second focus point. • February26: Latin America reported its first case. • February 28: Infections spiked in Europe. • February 29: The United States reported a death. **First class meeting**.
March 2020	• March 3: The U.S. officials approved widespread testing. • March 7: **Second class meeting.** • March 11: Based on Thai Immigration Police contact the outbreak had expanded in Thailand. WHO (2020c) declared the outbreak a pandemic. President Trump blocked most visitors from continental Europe. • March 13: The course and trip are cancelled. President Trump declared a national emergency. • March 15: Center for Disease Control recommended no gathering of 50 + people. State recommended closure of K-12. • March 16: **University announces all students to depart campus by March 20. Classes to go online.**

Note. Timeline of media coverage of the pandemic from December 31, 2019 to March 13, 2020 (day course was cancelled). New York Times (2020). https://www.nytimes.com/article/coronavirus-timeline.html

7. How heterogeneous are my data types?

Data were made up of notes with reflections showing rich and insightful descriptions of the development of the pandemic *vis á vis* the course.

8. What data should I use for the analysis?

It was critical to include the experiences related to both teaching and the interruption of the pandemic. The researchers examined the previous pandemics which served as a key to understand how a pandemic occurred and what happened during the pandemic and what measures needed to be taken. When Barry (2018) wrote about the great influenza of 1918, in the new edition of the book, the author also looked into the past pandemics and their commonalities: "to understand the commonalities of the few pandemics we have information about: 1889, 1918, 1957, 1968 and 2009" (p. 452) and stated that "all five came in waves" (p. 452).

9. Who is the audience for my analysis and how will members judge the process and subsequent findings?

The findings of this research might be useful for international education leaders, higher education leaders, academic leaders, qualitative researchers, risk managers.

INTERPRETATION OF FINDINGS AND DISCUSSIONS

The *unanticipated consequences* of the Covid-19 outbreak resulted in four major themes which led to the interpretation of findings as indicated in Table 3:

Table 3: Coding Data, Themeing Data and Interpretation of Findings

RESEARCH QUESTION: What were the experiences of the two faculty members teaching a pre-departure study abroad course during the pandemic?

CODING DATA	THEMEING DATA	INTERPRETATION OF FINDINGS
FIRST CYCLE: • In Vivo • Magnitude • Emotion • Values • Evaluation **SECOND CYCLE**: • Eclectic (Saldaña, 2016)	**1. The Course:** "excitement," "valuable," "unique kind-of-learning," "depth of experience," "student mindset," "lack of skills," "gaps," "value of preparing students," "maximizing experience," "researcher skills," "redesign course." **2. The COVID-19 Outbreak: "**fear," "coping," "safety," "off guard," "communication," "unknown," "false news," "off guard," "unprecedented, "on-going crisis," "gray zones." **3. Faculty Training:** "coping with uncertainty," "guidance," "not knowing," "significance of scenarios," "oil industry," "stretched thinking," "readiness." **4. Faculty Expertise:** "knowledge of the country… confidence…leading…effective planning…expertise…risks."	**The Course:** The course lacked skills training and needed to be redesigned as it would be offered in spring 2021. Adding practical applications to the comprehensive collection of materials would lead students to start shifting their mindsets prior to the trip rather than during the trip resulting in maximized experiences**.** **2. The COVID-19 Outbreak**. The outbreak was unprecedented in that it was not a short-lived occurrence but an on-going crisis. The uniqueness of the situation brought futuristic thinking and scenario planning to the forefront when developing and implementing such global programs. **3. Faulty Training.** Faculty were not prepared for an on-going crisis. To be able to cope with similar uncertainties and act decisively, faculty leading such experiences needed training in futuristic thinking and scenario planning **4. Faculty Expertise.** Country-expertise strengthened student trust when teaching the course. Developing, teaching such courses, and leading such experiences need to be backed up by location-expertise to foster confidence for optimal benefits.

Finding 1.

The Course

The course lacked skills training and needed to be redesigned as it would be offered in spring 2021. Adding practical applications to the comprehensive collection of materials would lead students to start shifting their mindsets prior to the trip rather than during the trip resulting in maximized experiences. Based on the lack of activities accompanying the discussions, it became essential to re-design the new course by incorporating practical activities so students could start shifting their mindset to avoid faulty assumptions, insensitive actions prior to the trip.

Discussion

The existing course presented the key concepts including *the ladder of inference* (Argyis, 1982, 1999) and *mental models* (Senge, 1995) as a set of reading/discussion activities to better prepare students for their experiential learning in Thailand. The ladder of inference developed by Arygis and later introduced in Senge's *mental models* described how we base our observations on our previous experiences, wrongly apply it to our existing beliefs, and moving quickly through a series of steps (hence *the ladder*), misinterpret the true meaning of such experiences, resulting in wrong assumptions, and eventually, improper conclusions and beliefs.

As indicated in Table 4, a framework was developed using the *Design Innovation Process Model* (Kumar, 2013). The model *Design Innovation Process Model* was considered a "reliable innovation process" for organizations (Kumar, p. 8), with adaptations, the model became the framework for the new course design. The proposed course would include activities which would assist students to develop and/or improve their skills and abilities ranging from sense making of cultural contexts and broadened mindset to promoting shared understanding and challenging assumptions prior to leaving for the trip. Students would be trained in understanding how to make observations; explore surroundings; capture facts; collect information; extract insights to make sense of the experiences; and be able to evaluate and cope with the new environment. With each activity, the description of each competency (achievement) acquired and/or developed would also be introduced resulting in awareness. Upon completion of the trip, students could use their newly developed knowledge, skills, and abilities to be able to plan and implement any initiative including their career planning effectively.

Table 4: Practical Activities Added to the Course

DESCRIPTION OF ACTIVITY	KEY METHODS	ACHIEVEMENTS
Activity 1: *Observation and Shifting the Mindset* Understanding how to gather *key facts* and *key cultural phenomena* to be able to articulate observations based on facts.	**Mindset:** Collect current perspectives and conventions regarding the culture and the country. **Media Scans:** Research key cultural phenomena to build a credible foundation and compare with previously held beliefs.	• Broaden mind • Build credible foundation • Visualize the context • Make observations
Activity 2: *Exploration of Environment and People* Exploring the thought process and challenging perspectives and assumptions.	**Video Ethnography and Cultural Artifacts:** Gain insights and discover perceptions through videos and artifacts from Thailand. **Perspectives to Exploration:** Use mental models to understand people's thoughts, feelings, and needs by listening, observing, interacting and analyzing" (Kumar, p. 88).	• Challenge assumptions and beliefs • Gain empathy • Increase flexibility • Interact
Activity 3: *Framing Insights and Making Sense of Experience* Connecting abstract knowledge to practical skills (Vaill, 1996) leading to sensemaking (Weick, 1995) of experience.	**Insight Sorting:** Sort insights and find patterns about the culture and people. **Activity Network:** Make connections using insights; identify challenges and "create solutions by foreseeing possible future situations" (Zull, 2020, p. 257).	• Manage the unexpected • Make connections • Analyze observations • Sensemaking
Activity 4: *Implementing a Plan* Evaluate and cope with the changing context.	**Value Hypothesis:** Assess insights, opportunities, perspectives to reframe expectations. **Competencies Plan:** Understand the critical role of competencies and pursue trip with a researcher's mindset.	• Cope with the unknown • Strategize and plan

Furthermore, as a second discussion, faculty and the universities owed it to the students and parents to prepare students for optimal benefits. The entire faculty-led study abroad programs including the objectives of the course, the trip, the competencies acquired during the experience - whether it be short-term or learning a new language or doing a field trip - should be standardized. To avoid giving the wrong impression to students and parents, these programs should be reviewed by an advisory board made up of faculty study abroad experts resulting in best practices in study abroad programs.

Finding 2

The COVID-19 Outbreak

The outbreak was unprecedented in that it was not a short-lived occurrence but an on-going crisis. The uniqueness of the situation brought futuristic thinking and scenario planning to the forefront when developing and implementing such global programs.

Discussion

This finding underlines the importance of *strategic planning like a futurist:* "deep uncertainty merits deep questions, and the answers aren't necessarily tied to a fixed date in the future….These are….best addressed with long-term planning" (Webb, 2020, p. 59). This outbreak has shown us that when designing strategic planning, not only should we take the *PHESTLE* (Dalat Ward, 2020) factors into account but also we would need to go beyond the thought process of "events can be preordained, chaos can be contained, and success can be plotted and guaranteed." (Webb, p. 59).

Finding 3

Faculty Training

Faculty were not prepared for an on-going crisis. To be able to cope with similar uncertainties and act decisively, faculty leading such experiences needed training in futuristic thinking and scenario planning.

Discussion

Acting abruptly and effectively as soon as possible to minimize risks is a must for all faculty leading such trips. However, emergency plans are not always standalone plans. Although programs can be cancelled based on regional or local emergencies, certain emergencies are global in nature, affecting every country. Such global emergencies demonstrate that it would be most appropriate to have future oriented "crisis preparedness unit" based on scenarios as stated by Barry (2018):

If there is a lesson from the 2009 pandemic, it's that too many governments were incapable of doing so. [Governments] had prepared plans for a pandemic as did the World Health Organization. They were reasonable plans that included good recommendations. Many of the plans attempted to limit the role of personality by laying out explicit steps to take – or not to take – based on certain triggers. But planning does not equal preparation, and that too many politicians ignored the plans. (p. 459)

Moreover, it is essential to consider a systems-wide plan taking all constituents into account widening channels of communication thus encouraging dialogues. Such plans and protocols also need to be regularly updated and sustained. To be better prepared for the *unanticipated consequences*, it is fundamental for universities to consider best practices and scenario planning (Chermack, 2011) like Royal Dutch Shell (n.d.) or a few universities like Colorado State University (n.d.) since "scenario planning is a revolutionary alternative to traditional strategic planning because it recognizes the unpredictable nature of the future …. makes uncertainty a part of the plan" (Chermack, 2011, p. xv).

When leading study abroad programs another crucial exercise to carry out as part of scenario planning is to consider a *hypothetical pre-mortem or post-mortem* (Klein, 2015) to ensure the success of their programs when dealing with the unknown. Using a hypothetical scenario of why the project failed by means of *pre-mortem* would allow designers and leaders to identify the mistakes and pitfall resulting in a more effective program design, development and implementation. Similarly, exploring a hypothetical "*postmortem* in the opposite direction would [sic]create a blueprint for success" (Klein).

When scenario planning becomes the new norm, developing risk management plans for study abroad programs using the Political, Health, Economic, Social, Technological, Legal and

Environmental (*PHESTLE*) factors together with the indexes identified by international organizations can be a starting point. Most international organizations such as the World Bank, the Organization for Economic Co-operation and Development, World Economic Forum, the United Nations, etc., use similar indices like the Global Peace index, Health index, etc.

Finding 4

Faculty Expertise

Faculty country-expertise strengthened student trust when teaching the course. Developing, teaching such courses, and leading such experiences need to be backed up by location-expertise to foster confidence for optimal benefits.

Discussion

The country expertise is of vital importance. When faculty leading such study abroad trips have living/working experience of the country, faculty can lead the experience with confidence creating trust. Even if a faculty is experienced in leading study abroad trips, if the selected country is an unexplored territory, it would be advisable for faculty to team up with a country expert to get advice. In addition, expert faculty could serve as mentors to novice faculty in designing and leading study abroad programs. Depending on the group size, each trip should have at least one experienced and expert faculty member. Furthermore, such experts on campus could conduct a standardized orientation program for inexperienced faculty.

LIMITATIONS

The limitations of this study included specific circumstances, specific experiences within a specific timeframe and a specific phenomenon. The specific experiences covered the teaching of the pre-departure study abroad course at a state university in the Midwest and how the course was interrupted by a pandemic and thereafter. Moreover, the dates of the research were crucial as the course was interrupted on March 11, 2020 as the COVID-19 was declared a pandemic by the World Health Organization (WHO, 2020). Therefore, the findings of this study can only be generalized to these very similar circumstances.

IMPLICATIONS FOR FURTHER RESEARCH

The following further research is suggested:

- A narrative design exploring educational leadership experiences during a long-term crisis.
- A causal comparative design comparing attitudes of different generations during a crisis.
- A descriptive design explaining the impact of communication throughout a crisis.

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