

GLOBAL EDUCATION BENCHMARK GROUP
GLOBAL EDUCATION STANDARDS
John Nordquist, Editor-in-Chief

INTRODUCTION

For several decades, schools and other organizations offering a variety of global education programs, which include adventure travel, service learning, exchanges, and other activities, have shared information and documents relating to policies and procedures on an informal basis. The Global Education Benchmark Group was founded in 2008 to collect data in order to assess outcomes and practices and to create nationwide standards for global education based on preferred practices among peer global education programs.

In surveying the field of programming standards, it is evident that principles underlying the standards developed by the Association for Experiential Education provide a standards model which transcended the "Adventure, Experiential, & Therapeutic Adventure" programs for which they were developed and may be readily applied to global education programs. This edition of Global Education Standards represents an adaptation of the AEE Standards to reflect the specific needs of global education programs. Not all AEE standards have been included, some have been edited to more explicitly address global issues, and new standards have been developed to fill gaps not covered in the AEE standards. Accordingly, AEE has no responsibility to any individual, organization, or entity that might claim a loss because of these standards or any part of them, and specifically disclaims any such responsibility.

The intent of the Global Education Standards is to provide a nation-wide set of guidelines to the qualities that characterize responsible global education programs and prudent professional practice. Organizations may use the standards to self-assess and improve their programs, design continuing education and professional development opportunities, and communicate with stakeholders as to the principles by which they operate. Independent schools may wish to use the standards as a component of their regional accreditation process to include global programming. GEBG is also engaged in on-going discussions among member schools and more broadly nationwide to raise the standards of global education in the United States.

It is important to note that the Global Education Standards is descriptive, not prescriptive in nature. The GES is intended to be a tool for organizations to use in program design and in the development of risk-management policies. Participation in global education programs involves inherent risks; compliance with these guidelines is no guarantee that participants will be free from injury or loss. Each organization must develop its own policies and procedures for global education programs consistent with its mission.

The Global Education Standards is comprised of three elements: the statement of a standard, descriptors of the criteria for meeting the standard, and, where possible, links to relevant examples of current practice from a variety of programs.

Acknowledgements:

The Global Education Standards was compiled, adapted, and edited by two working committees: Global Circles, an ad hoc group of educators and organizations from around the world to support and advance global education, and Global Education Benchmark Group, founded in 2008 to collect data to assess outcomes and practices in order to create nationwide standard for global education, both on and off campus. *Co-Editors:* Willy Fluharty, Vicki Weeks, Kevin Cook, Cecilia Nipp, Erin Lasky. *Contributors:* Joe Vogel, Manjula Saloman.

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CHAPTER ONE: PHILOSOPHY AND GOVERNANCE

SECTION 1. EDUCATION PHILOSOPHY AND ETHICAL PRINCIPLES

1.01 The organization establishes and communicates a shared mission, philosophy and pedagogy for its global education program, which guide the design of all elements of global learning and international activities

Descriptors:

- The program has a written mission statement for global learning and international activities that is communicated to staff and participants.
- The program has explicit outcomes for all activities in terms of understandings, knowledge, skills, and affective goals.
- The program designs learning activities aligned to outcomes.
- The program designs learning activities to develop consciousness of multiple perspectives.

Resource Links:

1.02 The program conducts regular assessments for learning activities aligned with stated outcomes.

Descriptors:

- Assessments are designed for learning activities.
- Assessment results are used to evaluate the effectiveness of learning activities and to inform curriculum and instructional changes.

1.03 Staff conduct their work with competence and practices within the boundaries of that competence.

Descriptors:

- Staff strive to maintain high standards of quality and performance in their work; seek appropriate education; participate in ongoing training; maintain current knowledge; hold appropriate credentials; and exercise reasonable judgment in the conduct of their work.
- Staff also recognize the boundaries of their competence and do not provide services outside of those boundaries.

Resource Links:

1.04 Staff respect the confidentiality of participant

Descriptors:

- Staff respect the fundamental rights, dignity, and worth of all people.
- Staff strive to be sensitive to cultural and individual differences -- including those due to age, gender, race, ethnicity, national origin, religion, sexual orientation, disability, and socio-economic status.
- Staff do not engage in any form of discriminatory or sexual harassment, or exploitation.

Resource Links:

SECTION 2. PROGRAM GOVERNANCE

2.01 The organization is the sole provider of all program activities.

- The organization is responsible for all aspect of program activities, including risk assessment and management.
- Responsibility for proving elements of a program may be delegated to a third-party provider, but accountability for compliance with relevant Global Education standards are remains with the organization.
- Contracts with third-party providers are with the organization.

2.02 In the event that the global program is a subset of a larger organization, the mission of the subset is aligned with the overall mission of the organization and lines of communication, authority, and accountability are clear.

Descriptors:

- The program operates under with the authorization of the organization in accordance with its organizational structure.
- Necessary information exchange occurs regularly between the program staff and its parent organization.
- Key employees of the parent organization are familiar with the global program's system, activities, benefits, and risk analysis and management practices.
- Job descriptions, organization charts, or other documents clearly describe lines of authority and accountability.

Resource Links:

2.03 The organization is appropriately incorporated or formed, the form of business organization is properly recorded and maintained, and the organization holds the necessary business licenses to operate its business.

Descriptors:

- The organization maintains and documents necessary legal standing.

Resource Links:

2.04 The organization maintains adequate types and levels of insurance coverage.

Descriptors:

- The organization's insurance coverage must be adequate to meet local, state/provincial and national requirements appropriate to where the program operates as determined by institution's legal counsel.
- The insurance coverage is explicitly applicable to the international context of the trip and its activities. (Particularly to include risk

assumed activities such as whitewater rafting, elephant rides, Tuk-tuks, and building or construction work.)

- Participants are insured (travel and overseas medical insurance, including evacuation to further medical facilities and/or home). Either the organization or the participants themselves may provide this insurance.
- Payment protection (eg. Trip cancellation or non-performance) is available.

Resource Links:

- 2.05 The organization's global program and activities are described accurately so that participants and potential participants understand the nature of the activities and can make informed choice to participate or abstain.

Descriptors:

- All program marketing and/or enrollment material is reviewed and updated on an ongoing basis in order to make sure it is clear, complete, and accurate and is presented in a manner that is understandable by the participants, for which it is intended.

Resource Links:

- 2.06 The organization has and implements a plan for ongoing program evaluation and improvement.

Descriptors:

- The organization regularly conducts reviews and gathers feedback from stakeholders and uses assessment results to inform decision regarding program improvements.

Resource Links:

- 2.07 The organization can demonstrate that it has taken steps to be in reasonable compliance with applicable local, state/provincial, and federal laws and regulations.

Descriptors:

- The organization will be familiar with and in reasonable compliance with laws, rules and regulations pertaining to their operations, including permitting and licensing requirements.
- This may include assistance from legal counsel, discussions with regulators or permit-granting agencies.

Resource Links:

CHAPTER TWO: PROGRAM MANAGEMENT, OPERATIONS, AND OVERSIGHT

SECTION 3. HUMAN RESOURCES: STAFF SELECTION, HIRING, TRAINING, AND SUPERVISION

- 3.01 The program has identified and communicated qualifications and core competency requirements for all staff, and hires accordingly.
- The program uses position descriptions to clearly state the qualifications and/or experience needed to lead a trip or conduct given activity and at what level of responsibility e.g.: trip leader, co-leader, assistant leader, or activity leader.
 - The program also states the core competencies for trip staff that define what specific skills are necessary and at what level of competency for different trip staff positions and activities. Core competencies might include, but are not limited to, specific technical skills, teaching skills, interpersonal skills, rescue skills, wilderness medical training and staff's competency to carry out the organization's emergency action plans and search and rescue procedures.
 - Core competency also includes the ability of staff to have sound judgment and to be prepared to respond appropriately to varying situations and circumstances. Examples might include, but are not limited to unusual or unwanted participant behavior, damaged or lost equipment and environmental challenges such as rapidly changing or extreme weather, or other potential and unforeseen program or travel situations.
 - Judgment is also relied on to allow staff to select activities and activity sites during a trip based on participants' skill levels, physical abilities, and psychological or emotional readiness and when applicable, staff has the ability to modify program goals and expectations to meet the needs and abilities of the participants. For example staff are able to assess the challenges (of the locale and skills) relative to the students' readiness to face an increased challenge and make appropriate modifications to their itinerary or lesson plans; this may mean ceasing the activity, altering the activity or proceeding with greater supervision.
 - Job descriptions and core competencies apply to trip staff regardless of whether they are paid, volunteer, or are students or interns.
 - Job descriptions are available for key administrative positions as well. For example, the organization has a job description that identifies academic or experience-based requirements of the supervisor of the global program in addition to listing job responsibilities.
 - The program has an established hiring protocol to assess and verify qualifications for candidates.

Resource Links:

- 3.02 Staff has the appropriate training to provide emergency medical care, and records of training are maintained.

Descriptors:

- Whether the activity is conducted in a remote or urban setting, this standard requires that at least one CPR-trained person is on site and readily available. The level of CPR training will depend on the age of participants as well as availability of emergency equipment. However,

at minimum it includes training in blood-borne pathogens, adult CPR, use of a barrier device and rescue breathing, and foreign body/airway obstruction.

- Programs working with children (less than eight years old) are trained accordingly.
- Programs that have access to an Automatic External Defibrillator (AED) have staff trained in its proper use onsite.
- If/when an program conducts an activity in an environment where it would take one hour or more to get an injured/ill person to definitive care (i.e. a hospital or medical clinic) at least one on-site employee is trained in at least 16 hours of "wilderness" first aid (WFA). If a program works in a remote environment where there is a potential a patient might not reach definitive care (or be handed off to appropriate rescue personnel) for six hours or more, at least one on-site staff member has a current wilderness first responder (WFR) or wilderness emergency medical technician (WEMT) training. Coursework includes theory as well as hands-on practice.
- Documentation of medical training should be kept current per the certifying entity. Copies of current staff certifications are kept on file and accessible.

Resource Links:

3.03 Staff has adequate knowledge of program venues.

Descriptors:

- All trip leaders have a general knowledge of the destination country. This knowledge includes, but is not limited to, an understanding of the potential environmental hazards of the area; an understanding of seasonal conditions and/or weather common to the area; an understanding of how the season and/or weather can affect the incident potential of the area; an understanding of the educational possibilities of the destination; and contingency or alternate routes of travel in the event a preferred route is deemed too hazardous.
- Familiarity of a destination does not necessarily imply that a staff member has visited a specific area. It does imply that s/he has enough global travel experience so that his/her focus can be on the participants, curriculum, and program goals.

Resource Links:

3.04 The organization has a system for assessing and supervising staff.

Descriptors:

- The organization has a system for evaluating staff's trip leading skills, interpersonal and group skills, and job performance and records of these evaluation processes are kept on file.
- There is also a system for providing feedback to employees regarding their performance and/or professional development needs.

- The organization also has a system to ensure that staff is able to provide feedback to management.

Resource Links:

3.05 There is a system in place to keep staff up-to-date on changes in policies, procedures, and practices for all program activities.

Descriptors:

- In order to keep field staff and key administrators current in their knowledge of the program's policies and procedures, including agreed-upon practices for the activities taught, the organization takes steps to communicate changes to all affected employees.

Resource Links:

3.06 In the event the organization contracts third-party providers for activities, a system is in place to assess and monitor the appropriateness of the subcontractor's credentials and performance.

Descriptors:

- In the event an organization hires a person or group to conduct or lead an activity, regardless of the length of the activity or employment, steps are taken to assess the subcontractor's competencies prior to the trip or activity start
- Vetting of a third-party provider should include, but not be limited to: qualifications of guides/activity leaders, third-party provider insurance, history, incident record, equipment used and inspections.
- Also, a system is in place to assess the subcontractor's performance, specifically as the performance relates to risk management.
- The organization keeps appropriate files on persons or groups that are subcontracted to provide services.

Resource Links:

SECTION 4. PROGRAM OVERSIGHT AND MANAGEMENT

4.01 The program staff has conducted risk analysis and management for counties and locales visited and for all program activities.

Descriptors:

- There are methods and procedures in place for risk analysis and management for all program activities, including incidental activities, in all locales.
- These procedures are used to identify hazards and associated inherent risks, and the procedures include measures for managing staff and participant exposure to these risks.
- This risk analysis and management occurs: 1) prior to programming, using various risk analysis tools that are available; using information resources such as guidebooks, personal knowledge or input from other staff, and; 2) during the activity when faced with real or potential

hazards or obstacles (e.g., checking local political conditions, road hazards, health concerns).

- The program has policies, procedures, and guidelines for decision-making in the field when unanticipated and unplanned opportunities to participate in activities arise. These policies, procedures, and guidelines include such issues as: designating staff with authority to make on-site decisions; risk-analysis and management guidelines; and communication protocols.

Resource Links:

4.02 The program has a written emergency action plan designed specifically for the country and locales being visited that addresses steps to be taken in the field and/or during initial response.

Descriptors:

- The plan includes specific information regarding available emergency services for each area in which participant travel or stay.
- Available evacuation services are listed.
- Emergency action plan includes in-country emergency notification procedures that specify who has authority to request emergency services.
- The plan included emergency communication protocols.
- Consideration is given to communication access in remote areas.
- The plan includes a local contact/agent who is available to assist in an emergency.
- Provision is made for the trip leader to access contingency funds as may be needed.
- The plan addresses contingency planning in the event a trip needs to be moved or cancelled.

Resource Links:

4.03 The organization has a designated and functioning risk management committee.

Descriptors:

- A risk management committee provides a mechanism for providing oversight to the program's risk management planning, implementation and performance and provides a system of checks and balances to the organization's risk management program.
- The committee is made up of persons combining program expertise (employees) and outside (non-employee) perspectives, which help to strengthen the organization as a whole. An effective committee has a representative mix of individuals including program staff and advisors such as other global educators, doctors, and lawyers.
- A risk management committee meets regularly and minutes are kept from each meeting.

- Committee findings are reviewed by program staff and incorporated into future planning and policies as appropriate.

Resource Links:

4.04 The program engages in periodic internal and external risk management reviews.

Descriptors:

- Risk management reviews are used to gauge the program's actual practices and consistency against its stated and expected procedures and whether or not the organization is conducting activities in a similar fashion as peer organizations.
- The risk management reviews are accompanied by a review written or verbal findings presented to program management and organization administration

Resource Links:

4.05 The program has a system for tracking and analyzing and debriefing field-related incidents.

Descriptors:

- The program has in place system for recording incidents and analyzing the data on an ongoing basis.

Resource Links:

4.06 Program staff is aware of the political and social conditions that prevail in the counties and locales being visited and has made contact with the appropriate government officials.

Descriptors:

- The program researches the locales' political and social condition as part of the venue selection process.
- The research uses multiple sources, such as the United States Department of State, security consultants, and in-country contacts.
- The program registers with the appropriate embassies.
- Participants and staff are made aware of the political and social conditions prior to agreeing to go.

Resource Links:

4.07 The organization, staff and/or participants have obtained appropriate insurance and necessary visas and permits for international programming.

Descriptors:

- Insurance coverage in the home country may not extend to international travel; therefore proper insurance coverage is obtained by the organization and/or individuals (staff or participants).
- Each participant's travel documents are verified prior to departure.

- Special attention is paid to documents of non-citizens of the organization's country of origin and to expiry dates of relevant travel documents.

Resource Links:

4.08 Prior to each travel activity, the program informs participants of the nature and goals of the activity, its requirements regarding physical conditioning and behavior, and the possible consequences of not meeting these requirements.

Descriptors:

- In order to enhance learning and increase the likelihood of a successful learning experience steps are taken to disclose the nature of the activities and the goals of the program.
- To improve the probability that participants meet an activity's fitness requirements a description of the physical requirements is provided prior to the start of the activity.
- The program informs participants of the rules of behavior, and participants are notified that these rules must be agreed upon, accepted, and followed.

Resource Links:

4.09 The organization has a no alcohol or illicit drug policy that is communicated prior to and enforced during all program activities. The policies apply to all participants, on-duty staff, 3rd-party providers, parent chaperones and volunteers.

Descriptors:

- It is recognized that some programs allow staff to smoke between and after activities, and/or to use alcohol at the end of a program day.
- Further, this policy does not apply to drugs that are prescribed by a physician and used accordingly.
- Programs consider context, congruency, and/or indications of inappropriate use or abuse of substances when examining this standard.

Resource Links:

4.10 Prior to the trip's start or prior to enrolling in the program, the organization takes steps to make sure that stakeholders are informed of, acknowledge, and assume the inherent risks, names and qualifications of trip leaders, and if deemed appropriate by the program, other risks of the trip. If the organization allocates legal liability for injuries or losses, it does so by means of appropriate agreements.

- Prior to an activity start or as part of the enrollment process, an organization takes steps to inform participants (and parents/guardians of minors) of the risks, perils, and hazards that can be reasonably anticipated. This education process can be conducted via oral

instruction, written literature, video, or by other means. This needs to be done at an appropriate time so that participants upon learning of the perils can choose not to participate.

- In the event an acknowledgement and assumption of risk form (or release or waiver) is used, participants and/or their guardians are given the opportunity to discuss the document and/or ask questions prior to signing it. It is not expected that this document be inclusive of all possible risks.
- Steps are taken to appropriately avoid or allocate responsibility and/or liability for injuries or losses related to program activities. Note that federal or state/provincial statutes, or other regulations, may limit the use of or otherwise affect the efficacy these of documents. Releases and related documents should be reviewed and approved by the organization's legal counsel regarding enforceability and consistency with the organization's philosophy and intent. (For example, the organization may choose not to be released for its negligence.)

Resource Links:

4.11 Health and medical considerations particular to the countries and locales to be visited are known and researched.

Descriptors:

- The program is aware of specific health and medical concerns in the particular countries visited and how these concerns may or may not be relevant to the planned activities. For visitors venturing off normal tourist routes or having close interactions with local populations, the available information on health and medical issues may not be completely relevant. Additional research may be warranted if visiting developing countries or remote or rural areas. Local medical facilities may not be staffed and/or supplied and maintained to the same standards found in the participant's home country.
- The program or individuals may choose to bring additional medical supplies such as extra gloves, sterile suture kits, and surgery grade antibacterial soap.
- Participants and staff are informed of health and medical considerations and health risks associated with the planned itinerary prior to agreeing to go.

Resource Links:

4.12 The program has explicitly designated staff-to-participant ratios for each international trip and activity

Descriptors:

- The ratio of staff to participants is sufficient to provide appropriate supervision, group management, and emergency response capability, as well as effective instruction.

- Common practice is for a minimum of two adult staff of mixed gender for any international trip. Ratios are typically 1:8 for overnight trips.
- Considerations for determining ratios for activities engaged on during the trip include the type of activity, the technical aspect of the activity, staff training and competency, remoteness of the activity location, environmental factors, and the participant profile.
- Only qualified staff are considered in determining ratios. Interns, staff-in-training or others who are not fully qualified as staff (see standard 3.01) are not considered part of the ratio. For example if the program determines that a trip leader and an assistant instructor are necessary to lead the trip a staff person in training cannot replace the assistant instructor.
- The program needs to be able to justify why it uses certain staff to participant ratios.

Resource Links:

- 4.13 In the event that the program allows solo adult leadership, appropriate risk management and crisis response steps have been considered and are in place.

Descriptors:

- As noted in standard 4.12, common practice is for all international trips to be lead by a minimum of two staff. However, for daytime activities during the trip it is acceptable for an organization to allow a single instructor to lead certain groups of participants during certain activities, the increase in risk – to participants as well as to staff – solo instructing creates are addressed prior to the course start. For example, participants are made aware of fact that there will be only a single instructor on site. Additional risk management steps – such as enhanced emergency response preparations – are considered and implemented, as appropriate.

Resource Links:

- 4.14 The program has a lost-person protocol and an established system for support services, if needed, in the event a person become separated from the group.

Descriptors:

- The program has procedures in place to help participants avoid becoming lost or separated from the group. Participants are educated regarding steps to take in the event they become separated from the group. Staff are be trained in knowing what to do once any participant (including staff) is identified as missing.
- The lost-person protocol includes, but is not limited to, an established time limit allowed for implementing lost-person protocol, and criteria for determining the need for additional assistance, procedures for maintaining the whereabouts and well-being of all other participants

during the process, and a procedure for contacting additional assistance from either the organization or other agencies or groups.

- Further, for all overnight travel, appropriate information and instructions should be left with program management. This information includes, but is not limited to, when to begin search procedures in the event the group does not show up as scheduled, the medical histories and contact persons for all group members, any potential deviations the group may take from the intended itinerary.

Resource Links:

- 4.15 The program has an approved, written field emergency management plan that addresses steps to be taken in the field and/or during initial response.

Descriptors

- The program has pre-established procedures for responding to and managing emergency situations.
- An emergency action plan may be one inclusive document or be a collection of documents that address specific aspects of emergency response and management.
- Emergency procedures need to reflect local conditions and the program's capabilities.
- The plan includes on-call information for the parent organization, as well as parent/school liaison protocols.
- The emergency action plan includes, but is not limited to, first aid protocols, field notification procedures for leaders to contact management or request assistance, evacuation procedures for self evacuation and/or requesting additional assistance such as helicopters or other agencies, procedures for contacting area emergency medical services, and serious injury or fatality protocols.

Resource Links:

- 4.16 The organization has an approved, written administrative crisis management plan to be used during and following an emergency or incident.

Descriptors

- This standard differs from 4.15 in that it is specific to a crisis situation that involves a serious and/or fatal injury. The organization has a crisis management plan that includes the administrative actions that will occur once the emergency has been stabilized in the field. A serious incident is one in which the patient's health is or may be compromised (e.g., loss of limb, loss of life, or serious illness).
- The administration has written guidelines to assist in supporting the injured staff/participant once they are out of the field.
- The plan includes steps for notifying and working with the victim or family of the victim (as well as non-injured staff/participants) a media

response strategy, a plan for communicating with staff, insurance agents, attorneys, and relevant community members.

- The plan gives consideration to providing emotional support for survivors that may include providing for a critical incident stress debriefing or providing resources on post traumatic stress to participants and staff.
- This plan also addresses long-term issues related to serious emergencies such as relations with the family of the patient(s)/victim(s), continued relations/support of survivors, incident investigations and how the findings of the investigations will be managed.
- It also addresses continuing support of employees involved in the incident including work status and provisions for ongoing assistance.
- The plan is periodically reviewed by the organization's risk management committee – and if appropriate, legal counsel and/or insurance carrier.

Resource Links:

4.17 Participants and staff have, or are provided with, the appropriate equipment, clothing, and footwear for each trip.

Descriptors:

- Staff and participants are informed of appropriate equipment, clothing, and footwear for the trip and each activity.
- The program conducts a gear check prior to departure.
- Equipment, including clothing and footwear, is appropriate and adequate for the type of activity being conducted and the specific environmental conditions in which the activity is conducted.
- Equipment may be provided by the program and/or it may be required that participants supply their own. The program provides clear direction as to what equipment is available from the program and what the participant needs to provide. Adequate information describing acceptable types of equipment is provided to participants for any equipment they need to provide.
- If participants are allowed to use personal technical or group equipment, the organization has a method for assessing and approving its use.
- The program has policies and procedures stating what protective equipment are needed for a particular activity and how it will be used. This includes, but is not limited to, items such as helmets (for climbing, cycling, equestrian, caving or kayaking/paddle rafting), personal floatation devices (PFDs), repair kits, spares (paddles), eye protection, and rock or ice protection.
- The program has policies and procedures regarding rental equipment.

Resource Links:

4.18 Participants have access to or are provided with adequate water and nourishment.

Descriptors:

- Adequate amounts of water are available for participants to maintain proper hydration and for cooking and cleaning. This may include providing potable water or access to a water source and a method for disinfecting untreated water. Individuals carry an appropriate personal water container for the activity they are participating in or have access to a common water source whenever they desire. The amount of water will vary depending on the specific activity, length of activity, type of terrain, environment, time of year and anticipated weather.
- Adequate amounts of food are available to meet the caloric requirements of the activities conducted. The amount and type of food will vary depending on the specific activity, length of activity, type of terrain, environment, time of year and anticipated weather. Food will have appropriate nutritional value to sustain health for the duration of the program and to meet the physical demands of the activities. Programs that permit fasting will explain that aspect of the program to participants before they agree to participate. If the program allows fasting, emergency food supplies will be available.
- The program has a protocol for assessing the adequacy of nourishment and water in the cultural context of the locale visited.

Resource Links:

4.19 Hygiene training or educational is provided, and appropriate measures are taken to minimize the spread of bacteria and disease. The program has appropriately addressed possible unique situations related to nutrition, hydration, and hygiene specific to the locale.

Descriptors:

- Measures are taken to minimize the risk of food and waterborne illness.
- Participants are taught the importance of hand washing after defecating and urinating.
- Considerations are made for changes in diet.
- Plans for procuring food supplies consider types and amounts of foods available and possible impact to the local economy, particularly in small villages.
- The program has considered how or to what extent staff and participants will or will not partake in local feasts or celebrations (if invited) where food is consumed.
- Standard 4.18 is adhered to and adapted as necessary for providing adequate water and nourishment.

SECTION 5. MEDICAL POLICIES

5.01 All staff and participants exchange appropriate medical information prior to the start of the activity, and appropriate personnel review the information. Additional individual medical and health concerns for international travel are specifically addressed. The information is properly managed and secured. (HIPPA)

Descriptors:

- Prior to any trip, staff and participants are asked to identify in writing preexisting medical, and if appropriate, psychological conditions that could potentially affect his or her well-being or success in the during the trip. Additionally, prior to a trip, the organization takes appropriate steps to warn staff and participants of potential environmental hazards that might affect a preexisting condition (e.g., participants who take birth control pills could be susceptible to strokes at high altitude). Specifically, staff and participants are informed that an activity might be contraindicated or be modified if certain conditions are present.
- The personal health history of staff and participants is reviewed and considerations are made for health conditions that may present challenges in another country. For example some medications may be illegal or unavailable in the host country or if a person uses injectable medications they may need to bring their own supply of syringes and other supplies. Staff and participants need to be informed of any vaccinations that may be required for entry to a particular country and are referred to appropriate national resources for advice on other vaccinations that may be recommended. Participants are informed of health and medical considerations and health risks associated with the planned itinerary prior to agreeing to go.
- If/when applicable, activities are adjusted for individuals with specific health conditions.
- A medical form used to gather information states the importance of completing the form completely and honestly (e.g., it might state that missing or misinformation could result in an injury or may compound the severity of an injury.) The organization has a system for identifying which employees should have access to confidential information, where the information is to be stored, and how long the information will be stored beyond staff/client involvement or employment. A procedure regarding form/document disposal should be in place as well.
- Information should be disclosed only on an as-needed basis, and each participant's confidentiality should be respected as required by applicable law.

Resource Links:

5.02 The organization defines specific first aid or emergency medicine practices that will be used.

Descriptors:

- Standard 3.01 addresses first aid or emergency medicine training and competency for staff. This standard specifically addresses the actual first aid practices the organization condones for use during the program.
- The organization identifies emergency medicine skills or curricula that are approved for use in the program.
- It should also include the use of medical protocols that provide specific directions for treating common injuries and illnesses, provide evacuation decision-making criteria specific to the program and provides guidance for any skills that might be considered outside the scope of practice for non-medical professionals.
- Medical protocols are written or reviewed and approved by a medical advisor.
- It is also important to be aware that a variety of different laws and regulations exist in relationship to some of these practices, for instance, participant and program medications, and that it may be helpful to consult on these issues with medical and legal advisors.

Resource Links:

5.03 The organization has a policy identifying how medication will be carried, secured, and administered in the field.

Descriptors:

- The organization has a system for communicating to staff and participants how it will handle the carrying, securing, administration and documentation of these medications. For example, the program might need to identify whether or not its policies allow for providing over-the-counter medications to participants.
- The organization also identifies documentation procedures it would require if medication is to be used.
- If field staff are allowed to administer participant medication, the organization ensures that applicable law(s) and/or associated training requirements are reasonably complied with.

Resource Links:

5.04 Participants are properly prepared for their role in injury prevention, emergency response, and risk management.

Descriptors:

- The program provides participants with training and/or education in injury prevention and emergency response. At minimum participants follow risk management procedures established by the program.
- In the event only a single trip leader is used to supervise an activity, participants or a trip leader is incapacitated; participants are taught emergency procedures prior to or shortly after the start of the program so they understand what to do in the event of an emergency.

- If it is foreseeable that participants would ever take part in an emergency action plan, participants are trained and equipped to contact staff and/or organization personnel in the event of a crisis or significant field emergency.

Resource Links:

5.05 Appropriate first aid, emergency, and rescue equipment is available throughout the trip.

Descriptors:

- First aid supplies – appropriate for the location, activity, and clientele -- are available and/or accessible throughout the activity. This equipment might be specifically intended for first aid and rescue use, or it can be improvised from other equipment.
- There is a system in place for ensuring that first aid kits are stocked and routinely checked so that non-complete kits are not inadvertently carried into the field. Similar steps are taken to ensure that other emergency equipment is routinely checked and properly maintained.

Resource Links:

5.06 The organization's medical policies and procedures are regularly reviewed by a consulting physician and the organization's legal counsel.

Descriptors:

- Medical policies and procedures should be reviewed by competent medical and legal persons to insure compliance with the laws of the jurisdiction within which the organization operates.
- As appropriate, field medical protocols are embodied in a written order from duly licensed physician.

Resource Links:

SECTION 6. TRANSPORTATION:

6.01 For international destinations, the organization has policies for all modes of transportation and 3rd party transportation providers.

Descriptors:

- Considerations include but are not limited to: specific driver eligibility requirements for operating motor vehicles; operator assessment and training procedures; specific and appropriate driver behavior practices are established and followed; policies applicable to passenger safety; vehicles are licensed for operation; adequate and appropriate insurance coverage; vehicles are maintained and serviced in a manner consistent with prudent and reliable operation; drivers inspect vehicles prior to each use; proper loading procedures and vehicle weight ratios are known and followed; all vehicles have adequate and appropriate insurance coverage; vehicles are maintained and serviced in a manner consistent with prudent and reliable operation; proper loading

procedures and vehicle weight ratios are known and followed; if trailers are used, appropriate procedures are identified and followed; vehicles are equipped with adequate emergency equipment.

- International programming presents particular challenges in vetting 3rd-party transportation providers. Any company hired by the organization to transport participants, staff, or equipment is in compliance with this standard, and the organization takes appropriate steps to verify that the subcontractor follows the standards, as applicable.
- In selecting local service providers, it should be expected that service providers such as transportation companies might not keep adequate records of vehicle maintenance or driver training. Nor should it be assumed that providers would comply with US laws and standards. However, reasonable effort should be made to ascertain that the provider complies with local law. The program should resolve such issues appropriately and communicate the differences in transportations standards to participants prior to the trip

Resource Links:

- 6.02 In the event an organization allows staff to operate vehicles to transport participants, staff, and/or equipment a system is in place to assess the driver and vehicle to ensure that all applicable standards apply.

Descriptors:

- Whether the vehicle is owned and/or driven by an employee, volunteer, or student, the vehicle and driver are held to all standards previously described. For example, adequate insurance for all passengers is in place. Proper maintenance is verifiable, and emergency equipment is carried.

- 6.03 Trip leaders visually inspect vehicles prior to each use.

Descriptors:

- Trip leaders know how to inspect various aspects of the vehicle prior to its use. These inspections include, but are not limited to, tire wear and proper inflation, oil and fluid levels, lights, horn, seatbelts, cargo, and other items as necessary.

Resource Links:

SECTION 7. DESTINATIONS AND VENUES

- 7.01 The program uses an appropriate process for selecting program destinations.

Descriptors:

- When planning a trip, destinations are selected so that participants are appropriately challenged and have successful experiences.
- Criteria by which the suitability of destinations is determined include, but are not limited to, the nature of the activity, the culture, the political

situation, the language, the terrain, the season, the weather, altitude, and the participants' abilities.

- A system or method is regularly or consistently used for assessing and evaluating activity sites and terrain.

Resource Links:

7.02 The program plans and conducts activities with knowledge and awareness of the cultural context of the host country.

Descriptors:

- As a guest in another country staff and participants are responsible for understanding and being respectful of local customs. Considerations include, but are not limited to, having some ability to speak the local language and communicating with local residents; knowledge of laws; knowledge of religious or spiritual customs and holidays; dressing appropriately; and understanding the contextual differences of being in a different country and culture.

Resource Links:

7.03. In the event of activities on undeveloped public or private lands or waters away from facilities, the organization has developed appropriate protocols based on Leave No Trace principles.

Descriptors:

- Prior to departure, participants are briefed on Leave No Trace principles.
- During the trip, leaders monitor compliance with LNT principles.

Resource Links:

SECTION 8: HOUSING (INCLUDING HOMESTAYS, HOTELS, HOSTELS, AND DORMITORIES)

8.01 The program has written policies and procedures for the selection of housing for participants and staff.

Descriptors:

- Policies and procedures are in place for the selection of all types of housing, including homestays, hotels, hostels, and dormitories. Standards for temporary shelter should be included in Section 11: Adventure activities (camping standards.)

Resource Links:

8.02 The program has an emergency action plan designed specifically for the country and locale of the housing.

Descriptors:

- In general, in case of injury while on homestay, the homestay coordinator will serve as first responder and make the decision to seek further medical attention following the programs emergency plan. (See standard 4.02)

- Students have been briefed on issues of personal wellbeing and as to procedures should problems arise.

Resource Links:

8.03 In the event the organization uses a third-party to provide lodging, the program's housing standards are communicated in writing to the provider. The provider agrees to comply.

Descriptors:

- The program documents communication of housing expectations to the provider in writing.
- The program takes appropriate measures to vet the provider's service history. This may be done by contacting previous clients and/or contacting local sources.

Resource Links:

8.04 The program has written guidelines governing homestays.

Descriptors:

- Homestays refer to situations in which participants are lodged individually or in small groups, in a private residence, without a program staff member present. Given the wide range of socio-economic and cultural setting for homestays, it is impossible to produce a policy that would address all possible situations. However, the program takes appropriate steps to ensure that participants' well being is safeguarded and that their experience is a positive one
- It is understood that guidelines may need to be interpreted within the cultural context of the homestay family. (eg. An entire family may share one sleeping space.) The guidelines should include:
- Sleeping arrangements should provide a separate sleeping space/bed for each participant. Should homestay participants share a room, it should only be with others of the same sex and similar age. Adults/students cannot share the same room. Males/females cannot share the same room.
- Special provisions are made as may be necessary to accommodate a student's cultural background. For example, in the case of female Muslim students, they must be placed into a homestay with another female student of the similar age, and if possible these students should share the same room. They must have adequate space and time to pray daily. They should be placed into a homestay without older brothers or other males in the house.
- Participants should not leave homestay without being accompanied by an approved member of the host family or program staff member.
- Families and participants should be carefully matched with regard to gender, diet, religious belief, special needs, etc.
- The program written expectations for the host family, which are communicated prior homestay placement. Host families are

responsible for the physical and emotional well being of their homestay guests. They should be oriented to the program's mission and expectations prior to accepting their responsibility as hosts. All homes must be inspected for health and safety provisions by program staff or partner organizations to ensure that they have adequate health and safety standards for the local region and students basic health and well being are provided for.

- There is designated homestay coordinator with a cell phone on 24/7 during the homestay activity who is reachable at all times by program participants, parents, and program staff in case of injury or emergency. All parties are provided with the contact number.
- In addition to tracking trip-related incidents (Standard 4.05), the program gathers post-homestay feedback from participants and hosts. This feed back is reviewed by program staff and "lessons learned" are included in future homestay planning.

Resource Links:

8.05 In the case of commercial lodging, the organization take reasonable steps of verify the appropriateness of the facility.

Descriptors:

- When possible, prior to booking a commercial hotel, hostel or dormitory, the program takes reasonable steps to verify the appropriateness of the lodging. This might be done online through review sources such as Trip Advisor, reports from other programs that have used the facilities, a pre-trip visit, or other in-country resources.

Resource Links:

8.06 Program follows procedure prior to departure and/or upon arrival regarding protocols for each housing situation.

Descriptors:

- Protocols should include, but not be limited to: Hotel rules; safety in hotel (fire escapes, etc.); which areas of the accommodation they are / are not permitted to access; rules regarding visiting each others' rooms – no members of the opposite sex allowed in room unless necessary during meeting times
- Leader and students check rooms for any potential hazards (eg. Electrical) – inform venue staff if maintenance required.
- Rooms are in close proximity to each other.
- Leaders' rooms are identified to group for emergencies.
- All rooms able to be locked from the inside and secured at the windows.
- Students share rooms with other students.
- Students informed to not open bedroom doors to anyone other than group members / staff.

- Students informed of rules regarding leaving the property (if permitted, groups, notification of staff, etc.)

Resource Links:

CHAPTER THREE: MANAGEMENT OF ACTIVITIES

SECTION 9: SERVICE PROJECTS

9.01 The organization has written policies and procedures for the conduct of service projects.

Descriptors:

- Specific guidelines that staff and/or participants are expected to follow—such as supervision requirements, equipment requirements, role and authority of program staff and staff from sponsoring agency—are easily accessible to and used by all staff and participants.

Resource Links:

9.02 The organization has an explicit and appropriate curriculum for service projects.

Descriptors:

- There are explicit educational or instructional objectives for this activity that address topics or skills taught, expected participant standards of performance, and appropriate assessment of participant abilities and understanding.

Resource Links:

9.03 Participants are provided with adequate instruction for the tasks to be performed, including the use of any tools or equipment that might be involved.

Descriptors:

- Staff are competent to teach and lead these activities per the standards found in section 5 of this document.
- If the project requires skills beyond staff's ability, qualified personnel are present to teach how to use tools and perform the work.
- Participants are taught the skills necessary to perform the work.

Resource Links:

9.04 Adequate supervision is provided for service projects.

Descriptors:

- Staff provide appropriate supervision of participants and oversight of the activities based on the skill, number, and experience of participants, and environmental hazards.

Resource Links:

9.05 Participants proceed at a pace that is appropriate for all group members and which will reasonably prevent injury or illness.

Descriptors:

- Staff monitor the strenuousness of the activity and adjust the pace as needed.
- Staff are able to gauge participants' fitness and comfort levels, and if/when a person is physically, mentally or emotionally unable to complete an activity, he or she may not be required to continue participating.

Resource Links:

9.06 The service project activity is conducted appropriately.

Descriptors:

- The program follows practices that are accepted within the industry. These practices might include, but are not limited to, use of proper safety gear such as eye protection, helmets, and gloves; proper techniques for lifting heavy objects; appropriate spacing of participants; guidelines for working at height, and communication methods between and among participants and staff.
- Work tasks are performed at appropriate speeds and are appropriate for participants' skill levels.
- If programming is conducted at night or during other diminished conditions, the practice is justifiable and appropriate precautions are followed.

Resource Links:

9.07 Participants are given a safety briefing prior to the activity or outing.

Descriptors:

- Regardless of the program's mission, participants should be briefed prior to the activity. This briefing might include, but is not limited to, expectations for behavior, a discussion of the goals and objectives, assessment and evaluation criteria, and safety rules. If applicable, expectations regarding risk management, inherent risks, and food, water, and clothing requirements should be discussed.

Resource Links:

9.08 Educational briefings or other forms of framing are conducted prior to the start of the activity. Debriefings or guiding processes are used afterward to enhance the experiential education process.

Descriptors:

- Experiential education is more than simply doing an activity. Appropriately introducing the learning experience and then offering opportunities for reflection after the activity is completed are essential components of the experiential education process.

Resource Links:

SECTION 10: EXCHANGES

10.01 The organization has written policies, procedures, and guidelines in place governing the conduct of an exchange.

Descriptors:

- Given the wide range of socio-economic and cultural setting for exchanges, it is impossible to produce a policy that would address all possible situations. However, the program takes appropriate steps to ensure that participants' well being is safeguarded and that their experiences are positive.
- The program's written policies, procedures, and guidelines take into account the needs of all participants, including the student, host families, teachers, administrators, and student body.
- The program has a procedure and guidelines for selecting and approving appropriate host families. This applies to both sending and receiving programs.

Resource Links:

10.02 The organization has explicit educational outcomes for exchanges.

Descriptors:

- The program has a clearly articulated vision of the goals for the exchange.
- Exchanges should be explicit structured to provide appropriate experiences and guidance for participant that will develop the knowledge, skills, and affective qualities necessary to meet the educational goals of the exchange.

Resource Links:

10.03 Participants are provided with adequate guidance and instruction for the exchange.

Descriptors:

- Staff overseeing the exchange have the necessary competencies to guide and instruct participants.

Resource Links:

10.04 Adequate supervision is provided for the exchange.

Descriptors:

- There is a designated staff member responsible for each exchange. Staff provide appropriate supervision of the exchange student. This might include both regular and informal "check in" with the student, touching base with the host family, and progress reports from teachers.
- Host families are aware of their supervision responsibilities.

Resource Links:

10.05 All participants are briefed prior to and at the start of the exchange as to all risk management and other policies, procedures, and guidelines.

Descriptors

- Students and host families receive written descriptions of all facets of the exchange and indicate their agreement with the terms of the exchange well in advance.
- Students are provided adequate orientation at the start of the exchange.

Resource Links:

10.06 Educational briefings or other forms of framing are conducted prior to the start of the exchange. Debriefings or guiding processes are used afterward to enhance the experiential education process.

Descriptors:

- The experiential value of an exchange is more than simply "doing an exchange." Appropriately introducing the exchange as a learning experience and then offering opportunities for reflection when the exchange is completed are essential components of the experiential education process.
- The debriefing includes all major participants, including host families, students, and educators.

Resource Links:

SECTION 11: ADVENTURE ACTIVITIES

This section is provided for programmatic activities that are not specifically addressed in other Standards. Examples of these activities include, but are not limited to, hiking/trekking, swimming, surfing, bicycling, backpacking, skiing/snowboarding, white-water rafting etc. When available, industry standards for these activities should be consulted.

11.01 The organization has written policies and procedures for conducting the activity.

Descriptors:

- Specific guidelines that staff and/or participants are expected to follow are easily accessible to and used by all staff and participants.

Resource Links: Link to AEE Standards.

11.02 The organization has an explicit and appropriate curriculum for the activity.

Descriptors:

- There are explicit educational or instructional objectives for this activity that address topics or skills taught, expected participant standards of performance, and appropriate assessment of participant abilities and

understanding, psychological readiness, and proper sequencing of activities.

Resource Links:

11.03 Participants are provided with adequate instruction for the activity.

Descriptors:

- Staff are competent to teach and lead these activities.

Resource Links:

11.04 Adequate supervision is provided for the activity.

Descriptors:

- Staff provide appropriate supervision of participants and oversight of the activities based on the skill, number, and experience of participants, and environmental hazards.
- The program has clear expectations for when direct supervision (staff present) is required and under what circumstances (if any) participants can be indirectly supervised.

Resource Links:

11.05 Participants proceed at a pace that is appropriate for all group members and which will reasonably prevent injury or illness.

Descriptors:

- Staff monitor the strenuousness of the activity and adjust the pace as needed.
- Staff are able to gauge participants' fitness and comfort levels, and if/when a person is physically, mentally, or emotionally unable to complete an activity, he or she may not be required to continue participating.

Resource Links:

11.06 The activity is conducted appropriately.

Descriptors:

- Staff follow the current and accepted industry standards or practices for the activity.
- If programming is conducted during other diminished conditions, the practice can be justified and appropriate precautions are followed.

Resource Links:

11.07 Participants are given a safety briefing prior to the activity or outing.

Descriptors:

- Participants are briefed prior to the activity. This briefing might include, but is not limited to, expectations for behavior, a discussion of the goals and objectives, assessment and evaluation criteria, and safety rules. If applicable, expectations regarding risk management, inherent risks, and food, water, and clothing requirements should be discussed.

Resource Links:

11.08 Educational briefings or other forms of framing are conducted prior to the start of the activity. Debriefings or guiding processes are used afterward to enhance the experiential education process.

Descriptors:

- Experiential education is more than simply doing an activity. Appropriately introducing the learning experience and then offering opportunities for reflection after the activity is completed are essential components of the experiential education process..

Resource Links:

11.09 Staff are familiar with the activity.

Descriptors:

- In order to minimize the potential for encountering unexpected hazards, staff conducts appropriate preliminary orientation to the site and/or activity being used. This might include, but is not limited to, staff are knowledgeable about current and accepted industry practices, staff having appropriate training and experience with the activity, and receiving input from other staff or knowledgeable people concerning the activity.

Resource Links:

Section 12: Glossary of Terms

12.01 Activity: any undertaking offered to participants designed to contribute to the achievement of the stated mission of the program.

12.02 Adventure activity: activities voluntarily undertaken that present an acceptable level of risk and challenge that might in daily life be avoided. These activities require technical competence to manage the risk.

12.03 Competence: possessing the necessary and appropriate training, knowledge, experience and other qualities required to instruct or lead an activity.

12.04 Direct supervision: to be physically present, or within an immediate distance, and available to respond to the needs of participants.

12.05 Emergency: situation that poses an immediate risk to health, life, property, or environment, requiring urgent intervention.

12.06 Homestays: situations in which participants are lodged individually or in small groups, in a private residence, without a program staff member present.

- 12.07 Incident: an event with the potential to cause loss to health life, property, environment or change of plan.
- 12.08 Incidental activities: activities not anticipated or planned that present themselves in the field.
- 12.09 Indirect supervision: a situation in which the activity leader supervises the activity but is without the ability to personally intervene immediately.
- 12.10 Leader: competent person designated by the organization to be responsible for a particular group of participants or activity.
- 12.11 Organization: the legally constituted entity (school, company, or individual) that administrates the program.
- 12.12 Participant: the person taking part in a program but not a staff member.
- 12.13 Program: the administrative structure by which the organization delivers global education activities.
- 12.14 Remote region: a location where access to communication, medical care, and/or rescue resources is difficult. Organizations will determine specific time factors to be considered. Many programs consider an area to be remote it would take more than six hour for assistance to reach an injured person.
- 12.15 Risk analysis and management: the systematic assessment of exposure to hazard and the determination of mitigation and response.
- 12.16 Staff: all leaders, voluntary or paid, designated by the organization to deliver a program or activity.
- 12.17 Stakeholder: any person with an interest in the program. In addition to staff and participants, this could include parents, teachers, and fellow students.
- 12:18 Third party provider: any provider of one or more contracted program services to the organization.