

2010

**A Study of Selection, Training, and Host Country Cultural
Adaptation Experiences of Expatriate Faculty from United States
AASCU Universities**

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A Study of Selection, Training, and Host Country Cultural Adaptation

Experiences of Expatriate Faculty from

United States AASCU Universities

A dissertation

Presented to

The College of Graduate and Professional Studies

Department of Technology Management

Indiana State University

Terre Haute, Indiana

In Partial Fulfillment

of the Requirements for the Degree

Doctorate of Philosophy

by

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December 2010

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ABSTRACT

Literature addressing selection, cross-cultural training and determinants of a successful or failed expatriate experience is extensive for those in business, but there is little research on these topics for professional academics. This research expands the understanding of why academics expatriate, how they were selected, what their perceptions of a successful experience are, what pre-departure cultural training they received, and what factors may have been difficult. Expatriates are professionals who live and work in a foreign country. This status study of male and female faculty from two AACSB universities expands knowledge on academic expatriation. The response rate was 54%. Independent sample *t*-tests were used to analyze data with gender as the grouping variable. There was no institutional requirement for expatriation, but it is encouraged. Reasons for expatriation were the experience, conduct research and teach. Business and academia look to expand internationally. While academia seeks to attract a more diverse student and faculty base, business may be seeking quicker access to raw materials, labor and markets. Traveling spouses had fewer difficulties adapting to a host culture than children. Few academics received cross cultural training. It is recommended a formal selection instrument be designed specifically for academics. Training programs should include cultural differences, cultural adaptation, and professional expectations. Additional study of success and failure factors such as living conditions, host cultures and formal training is recommended. As universities continue to grow faculty and student exchange programs, training needs to grow in ways to support expatriation, cultural understanding and the goal of a successful expatriate experience.

PREFACE

The foundation for this manuscript comes from the desire to know more about expatriation experiences and pre-departure cross-cultural training of academics and to determine what makes an academic expatriate assignment successful. Shortly into conducting the literature review, it was determined expatriate academics and their respective selection for assignment, pre-departure training, and cross-cultural adaptation experiences have received little attention in the refereed journal community. However, these same topics have been well researched for those in business. This manuscript expands on the discussion of expatriate academics quantitative and qualitative review to identify what makes an academic expatriate experience successful, what leads to failure, determine what training respondents have had and need, and make additional selection, formal training and research recommendations for this understudied topic.

ACKNOWLEDGMENTS

I would like to take a moment to acknowledge the skilled advice, direction, input, and overall support of an individual who helped me to formulate an idea and make it a research reality. My research advisor, Dr. Tad Foster has an ability to guide his advisees on a path to new knowledge and discovery that may not otherwise be developed. Thank you, Dr. Foster.

I would also like to thank the members of my dissertation committee for their time and efforts. Each provided me with valuable insight that will be appreciated forever. Thank you very much Dr. Bassou El Mansour, Dr. Vincent Childress, Dr. Cynthia Thompson, Dr. Dorothy Carole Yaw, and Dr. Tad Foster.

I want to thank my parents Paul and Elizabeth Fenton. I have great admiration and respect for the work they did raising a family. My dad was a well-schooled member of the academy and respected member of the faculty at a Mid-western university for 34 years. I learned how to work with and understand the needs of the entire university community from Dad. His memory guides me to this day. Mom raised me to respect people and to help those in need whenever possible. She helped open my mind to becoming a member of academia.

This research is dedicated to my wife, Jeannette who has been with me every page of the way in her support and understanding of the times I was away because I was conducting research; so often overseas. I also dedicate this research to my son, Gabriel. This work was done before he was four years old. When I had to go back to the office or travel, I whispered in his ear I was writing this for him. Jeannette and Gabriel are my family, my inspiration, and my life.

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CHAPTER 1

INTRODUCTION

The opportunities for those in business and industry to spend extended periods of time living and working in a country other than their home country are extensive and for many of these professionals it is often either required or considered as a normal part career development (Brewster, 1997; Tams & Arthur, 2007; Tung, 1987; etc.). For academic professionals, this researcher is not aware of any similar sojourner requirement. However, there are opportunities for academics to take on expatriate experiences such as the Fulbright Scholarship Program, the Toyota International Teacher Program, and The Wisconsin in Scotland Program, a consortium of Wisconsin universities sending students and faculty to Dalkeith, Scotland and many other opportunities from institutions throughout the globe.

Taking on an expatriate academic experience may be encouraged, but is not required. In the internationalization process in higher education, there has been increasing emphasis for faculty to have an expatriate experience. What is unclear is the status of these efforts at the institutional level and of the individuals' experiences as an expatriate academic. For example, what reasons are given for encouraging and approving an expatriate opportunity at the administrative level? Does the institution have a formal plan and policies governing international activities? What reasons are given by the individual for choosing to expatriate? What if any kind of training did the individual have prior to or while on their expatriate experience to help them to

develop an understanding of a host culture? How do the institution and the individual define success? What reasons explain the perception of success?

It is important to note the terms 'business' and 'industry' in this research are used primarily to address those professionals in non-academic positions. However, there are other industries that have a different classification. For instance, government is an industry addressing the management of national, state, and local political affairs and meeting the needs of the public. The United States Department of State, The Central Intelligence Agency, The United States Information Agency and other government entities have expatriate employees stationed throughout the globe as do many other nations with similar functions. There are non-profit industries such as missionary organizations including Wycliffe Bible Translators with expatriates in many developing countries (Wycliffe, 2009). Education is also an industry that can be classified into elementary, secondary and post-secondary levels. This research focuses on post-secondary education at the comprehensive university level and members of the academy who have expatriate professional experience.

Tams and Arthur (2007) in *Career Development International* used the term self-initiated expatriate. These are people who are seeking employment outside of their home country for a variety of reasons. In addressing why business and industry professionals decide to self-expatriate, Tams and Arthur (2007) indicated industry professionals may be seeking political or economic betterment, seeking adventure or change, be younger people taking advantage of foreign opportunities, could be job seekers escaping unemployment in their home country, be someone with specialized skills needed in another country, or for some other reason someone who has decided to stay abroad for an extended period of time or possibly on a permanent basis.

Richardson and Zikic (2007) made three distinctions in defining an expatriate academic in their research of British academics. An expatriate was someone with more than one year overseas but less than ten years, migrants were those who had sought employment outside of Great Britain on a permanent basis, and sojourners were those who relocated to another country for less than one year. In every case, the academics surveyed were self-initiated expatriates.

Reasons to Become an Expatriate Academic

To better understand the status of the expatriate academic experience, a review of other reasons for people seeking employment outside of their home country is indicated. For example, Japan is experiencing a population increase in older citizens and a declining population of younger citizens due to reduced birth rates and citizens waiting longer to marry; thereby leading to a decline in the number of people in the workforce (Matsukura, Ogawa, & Clark, 2007). One way to overcome this decline is to encourage Japanese couples to have more children or to allow more non-Japanese people to come to Japan to live and work (Wagner, 2007). Japan, a relatively closed society when it comes to immigration, has begun to accept more economic immigrants in an attempt to overcome this population shift and to ensure a replenishment of the national coffers (Ball, McCulloch, Geringer, Minor & McNett, 2008).

Further, over the past several years, more organizations are making it possible for students, future business professionals and academics to develop an international cadre. The Institute of International Education (IIE) has been charged with administering the Gilman International Scholarship Program funded by the United States Department of State. In 2005, this program has sent over 500 American students on their first study abroad experience. Many of the destinations were to non-traditional such as Ghana, China, and Costa Rica (IIE, 2006).

Other programs such as the Japan Fulbright Memorial Fund has sent over 600 American professional academics to Japan to learn about the Japanese culture, education system, and Japanese industry. The Toyota International Teacher program has funded similar programs sending United States educators to Japan, Costa Rica and the Galapagos Islands. All of these programs are designed to give participants international cross-cultural experiences and prepare them for a future interacting with professionals from other cultures or teaching students about other cultures and their experiences as an expatriate academic (IIE, 2006).

The academics mentioned above traveling to other countries for experiences with the intention of returning to their home country institution are expatriate academics. While this proposed research focuses on expatriate academics from the United States, additional study may yield information as to why some academics seek a more permanent expatriate position outside of their home country regardless of country of origin.

In some countries, it may be a simple necessity to hire foreign professors and other academics to fill a gap caused by retirements, increasing student populations, and not having enough domestic professionals to close the gap. In Canada for instance, 40% of faculty are international or expatriate academics (Richardson, McBey, & McKenna, 2005).

Some universities from outside of the United States hire American faculty deliberately. Including an English-speaking university in Cairo, Egypt where 15% of the faculty is from the United States (Garson, 2005). Other universities such as Carnegie Mellon University from Pittsburgh and State University of New York at Buffalo have established entire degree programs in foreign countries (Bollag, 2006). Faculty members from the home and host country participate in the instructional process. This off-home campus degree program is designed to meet the

educational needs of other nations while not requiring attendance at the home university by foreign students.

U.S. universities are not unique in this approach. Thirty-eight of Australia's 39 government maintained universities have entire degree programs in foreign countries. Courses are taught online and face-to-face by faculty from the various universities as well as local faculty (Bodycott & Walker, 2000).

There may be many reasons why an academic would seek short or long-term expatriate experiences, but leaders from business have sent a clear signal to higher education institutions that students attending a university should have access to knowledgeable faculty when it comes to international business. In a study of *Forbes* 100 Largest Multinational firms and *Fortune's* America's 50 Biggest Exporters, 79% of the Chief Executives indicated all university students should take an international business course and 70% of business graduates should have proficiency in a foreign language (Ball, McCulloch, Geringer, Minor & McNett, 2008).

Another type of organization using expatriates is a non-governmental organization (NGO) such as a missionary organization. Chapter 2 will review the current practices of expatriate selection and training for business, governmental organizations, for NGOs such as the Southern Baptist International Mission Board and Wycliffe Bible Translators, and to the extent known through the current research, the selection and training of expatriate academics.

Socialization

Socialization, a process of learning and adapting to the roles of society can come from formal and informal exposure within an individual's home country surroundings. Bandura (1986) writes that socialization is a learning process and can be formal such as what is learned in school and on the job. Socialization can also be more informal in nature in terms of what an individual

learns from observation and imitation. Socialization can come from the upbringing an individual has within their household, community, their church, extended family, peers, and so forth. This researcher learned about ethical standards of treating others, learned to drive, the alphabet, and responsibility from familial relationships and from formal education. However, socialization is not limited to the family and the local community whether it is formal or informal, upbringing related or from an educational or training perspective. Socialization is also tied to the adaptation process when living and experiencing what it is like to interact within a different culture. This research focuses on the socialization of an adult to another culture. While one can become comfortable within the host culture, total acculturation may not be realistic.

Social Networks

Osman-Gani and Rockstuhl (2008) completed an extensive meta-analysis of empirical research on the concept of socialization as a success factor for business and industry expatriates and related implications for training and development. Osman-Gani and Rockstuhl noted there was a considerable need for additional research related to social development of expatriates. Osman-Gani and Rockstuhl wanted to know why human resource development professionals should consider the social networks of expatriates as a human resource development issue. The argument in support of this question was that expatriates are often faced with job uncertainty and stress because of language differences, differing cultural value systems, and expectations about appropriate behaviors. Osman-Gani and Rockstuhl noted these topics are clearly related to the social development of expatriates. Among their findings was that social learning capital and social learning theory can play a significant role in the cross-cultural adjustment and work performance of expatriates.

Success and Failure as an Expatriate

The number one reason for business and industry expatriate failure is the inability of the expatriate, and/or their traveling partner and family if applicable, to adapt to their new culture (Jack & Stage, 2005; Sims & Schraeder, 2004). Bodycott and Walker (2000) noted that expatriate academics tend to share their experiences amongst themselves and there was little data on the changes expatriate academics experience in their foreign assignments and it is not known if the inability to adapt to the foreign culture is a limiting factor as it is in business and industry. This conclusion from Bodycott and Walker leads in part to the need to determine what the current status is regarding expatriate academic experiences.

Varner and Palmer (2005) argued the ability to adapt to a host country culture plays a critical role for an expatriate to have a positive experience and conscious cultural self-knowledge is a key variable in adapting and socializing to other cultures as a positive factor to a successful expatriate experience. By knowing about the host culture, the expatriate will be better able to interact within the host culture. Another scenario would be for an American to travel to a host country where the culture is more forgiving and would require less adaptation.

Problem Statement

The problem is that it is not known if expatriate academics go through a similar acculturation and socialization processes as those in business and industry or if the factors identifying a successful international academic assignment are similar to those in business and industry. Therefore, it is suggested the current status of the academic expatriate process should be further researched.

Purpose Statement

This research is designed to contribute to the body of knowledge about the status of the expatriation process for expatriate academics, to make note of how they learned about their new host culture, to identify similarities or differences as compared to the current research of those from business and industry, to determine if there is a perception that an expatriate academic experience can have an impact on their respective careers, to add to the limited body of knowledge about expatriate academics as a group, and to offer additional recommendations for training and continued research.

Questions of the Research

The following questions have been developed to identify the current status of expatriate academic selection, cultural adjustment practices, and what can be identified as a success factor for an expatriate academic experience:

Question 1: What are the reasons given by American faculty for choosing an international academic experience?

Question 2: What training or other preparation methods did the expatriate academics use to become more acclimated to their host culture?

Question 3: What factors contributed to the faculty member's perception of a positive experience?

Question 4: To what extent are the factors contributing to success of expatriates in business and industry similar to the factors contributed to the faculty member's perception of a positive experience?

Question 5: What are the institutional conditions that support or detract from faculty involvement in expatriate experiences?

Question 6: How is an academic expatriate experience defined as being successful?

Question 7: What is the relationship between age, gender, level of pre-departure training, family issues, institutional and individual career expectations, and the level of success of the expatriate academic?

Assumptions

In order to complete this research, the following assumptions have been made:

Data. For the purpose of this study, it is assumed that the data is based on fact and is valid. It is also assumed that respondents have been fully honest in their responses and respondents have met the criteria as an expatriate academic. Expatriate academic respondents are limited to those with experience within the past five years to limit memory loss issues.

Memory. Over time, memories may tend to fade. Respondents for this research must have completed their expatriate experience within the past five years. It is assumed that their respective memories of their cultural adaptation and learning processes will be readily recallable to provide accurate data.

Expatriate Participation. It is assumed that academics participating in an expatriate experience will provide a personal and professional benefit to the academic.

Respondents. It is assumed that the respondents are self-aware enough to the point of providing accurate and adequate responses to the instrument questions and that their perceptions of their respective expatriate experiences have been clearly articulated.

Self-Efficacy. Self-efficacy is the level of belief that one has the ability to accomplish a particular task. In the case for this research, self-efficacy relates to the ability of academic expatriates to meet the expectations of an international assignment and to, presumably, have a positive experience as a result. This belief can come from experience as well as from the training an academic undertakes in anticipation of their expatriate assignment (Bandura, 1977). Because academic expatriate respondents are self-selected in nature, it is assumed respondents have a sufficient level of self-efficacy to believe they will be successful while on their expatriate assignment.

Limitations

The data collection timeframe is the spring of 2010, it is possible that not all of the respondents with previous experiences are able to recall their international or expatriate experience in its entirety and responses could be subjective in nature. This is being adjusted for by using expatriate academic respondents who have had at least one expatriate experience within the past five years.

Response rate will be an important factor in gathering sufficient data on selection and training to make a comparison between those in industry and those in academia. A low response rate could skew the conclusions and recommendations. However, due to the limited body of knowledge currently available, it is believed this research can provide a basis for additional research on the question of academic expatriate training and development.

The data coming from respondents of two universities may not yield enough information to fully address the questions of the research. The respondents may have limited expatriate experience and the resulting data may be skewed to one set of conclusions while, in fact other conclusions are more appropriate. This limitation is offset to the extent possible due to the size of

the population being surveyed. The population for this research is considerably larger than any previous research of addressing expatriate academics. The questionnaire is being sent to 65 potential respondents. Previous studies such as that by Richardson (2002) and Richardson, McBey and McKenna (2005) used considerably fewer respondents in just four countries.

Great efforts have been taken to eliminate researcher bias. This includes the researcher, who has also been the faculty training coordinator and the one responsible for training evaluation from 2004-2007 for the Wisconsin in Scotland program, relinquished these duties on a permanent basis in the spring of 2007. In another effort to reduce research bias, the researcher has purposefully not focused on the Wisconsin in Scotland program for data collection. However, it is possible some of the respondents are former expatriate academics within the same Scotland program. All respondents have the option of not completing the survey or to terminate participation at any time.

Another limitation is the respondents may have a pro-participation bias because of their interest in this particular topic. Although they may provide answers to many or all of the questions in the instrument, it is possible the quality of the responses may be limited due to fading memories of their respective expatriate academic experiences and the desire to participate.

Definitions

Academic Expatriate. An academic professional who is currently or has had previous experience in international assignments.

Culture. An operating system of the mind that distinguishes different groups of people psychologically and in many cases in appearance. Culture impacts attitudes, beliefs, behaviors, and is often unconscious (McFarlin & Sweeney, 2003).

Culture Shock. The anxiety that results from losing familiar signs and symbols of social intercourse and reflected in culture based adjustment difficulties in functioning satisfactorily in the host country (Pires, Stanton & Ostenfeld, 2006).

Expatriate. Someone who is living and working in an assignment outside of his or her home country.

International Academic. An academic professional who has been hired by a university as an ongoing tenure or tenure track position with the expectation of long-term employment.

Repatriate. A person who has returned to his or her home country environment from an expatriate assignment.

Stress Tolerance. The ability to engage in goal-oriented activities despite the existence of pressures such as workload or time pressures.

Successful Expatriate Experience. To complete an expatriate assignment meeting the professional objectives of that assignment and the ability to adapt to the host culture.

Summary

This research identifies the current status of expatriate academic experiences, identifies more about the learning processes and the social and cultural adaptation process of expatriate academics in an effort to identify factors leading to a positive experience while participating in an expatriate academic experience and determines if institutions and/or the expatriate academic can do more to prepare for a positive transition to a host culture. While the majority of available data addresses these topics for those in business and industry, the respondent population for this research is expatriate academics.

The current literature addressing expatriate academics is limited as compared to those in business and industry or other non-governmental organizations. What is known is there are two

categories of international and expatriate academics. One is the academic who has sought out international academic experiences for short-term academic assignments such as a Fulbright Scholar or other short-term academic experience with the intention of returning to their home institution or to move onto another host culture. The other is an international academic who pursues employment as an academic with the intent to secure a tenure track position or other form of long-term employment in an academic setting of some kind. This research focuses on the expatriate academic. It is presumed for this research the expatriate academic has gone through some form of cultural adaptation, but exactly what the process is or if they were able to adapt to the host culture and have a generally positive experience is not fully known or understood.

This research is designed to identify the current status of expatriate academic experiences of two, Midwestern universities, and to identify factors leading to a positive cultural expatriate academic experience.

CHAPTER 2

REVIEW OF LITERATURE

What factors lead to a positive international experience for expatriate academics and what their acculturation, socialization and other host country learning and adaptation processes are provide the foundations for this research. This review of literature will identify trends and review topics associated with cross-cultural socialization, what it means to have a positive expatriate experience, expatriate selection procedures, expatriate issues associated for those in business and industry & non-governmental organizations including expatriate success and failure, culture shock and expatriate training. Also included is a review of the available literature specifically addressing expatriate academics. It should be noted that due to the dearth of empirical, applied and meta-analysis research on expatriate academics, the overall review of literature is heavily focused on those from business and industry and provides a basis from which comparisons can be made of the data collected for this research. Of interest to note is a similar lack of applied and empirical data addressing government expatriates and it may be beneficial to conduct a similar status study of governmental employees.

Socialization and Enculturation

Earlier it was noted that the point at which someone becomes socially competent within their own culture is not easily definable. However, applying legal definitions society does make some distinctions when it comes to socialization. For example, in the United States, the federal

and legal system of most states recognizes that an 18 year old can vote, that a 16 year old can legally drive a car, and that a 21 year old can legally consume alcohol. Other countries have similar distinctions based on age.

While these are clearly definable life events, what is not clearly defined is at what point an individual is culturally competent within their own culture, when automaticity in adapting to cultural events is just a part of who someone is. This learning process takes time. Rogers (1983), and Rogers and Kincaid (1981), address socialization as a diffusion of innovation process writing that information regarding new ideas, such as adapting to a society, is expressed via linked relationships and that people will share their knowledge with others in order to seek and receive feedback in order to understand and influence each other. It follows that expatriates regardless of profession, to successfully adapt to a host culture, will also go through a diffusion process in adapting to a host culture over time.

O'Neil (2006) writes that people are born without culture and socialization is a process by which people acquire culture. Of course, people will have varying degrees of success in the socialization process. Some easily learn and socialize; others cannot seem to make the connection, while others are between the two. For those who are more apt to successfully socialize, people develop language abilities, develop an understanding of societal roles including various work roles and people develop an understanding of cultural norms which are considered to be appropriate and expected behavior(s), which are held by a majority of members of a particular society (O'Neil, 2006). One item to add here is O'Neil writes that socialization is the process of acquiring one's culture, but that enculturation, a term used by anthropologists, is the process of being socialized into one's specific culture by their parents and others whom someone is significantly exposed to as they grow and mature. What this means is that as an individual

ages, he or she will take on the cultural norms and expectations of their home culture. They will learn from their family, their community, and via formal and informal education and training.

In 1977, 1986 and 1997, Albert Bandura addressed social learning theory as a component of the socialization of people through behavior modeling. Bandura writes that through social learning theory, people's behavior or reaction to an event is centrally processed in the mind before it is performed and that a response to another's behavior or events is guided by previously modeled actions of others (Bandura, 1977). This is not to indicate that reactions to others' behavior will be uniform or the expected reaction to a behavior will be universal in nature. For example, when an individual begins the process of learning about a new culture, there are obstacles to the socialization process. This would include the time it takes to adapt, learn and process new ways of living in a host culture. People tend to be "reluctant to go through the tedious process of developing new habits" and that insecurities individuals have can surface in their behaviors, and "adaptation of innovations involving complex skills that are not easily teachable (e.g. learning a new language) is slow" (Bandura, 1986, p. 160).

Further, Bandura (1986) addressed the topic of sociocultural diffusion and adaptation for people of different cultures. While there is pressure to adapt to a host culture and to reshape behaviors in a diffusion process, someone from a different culture may synthesize host culture patterns or borrow elements of the host culture. Bandura noted there are obstacles to change such as adapting new practices, being forced to learn a new way of living, and the time required to go through the cross-cultural learning process. If the time delay between adapting a new practice and the resulting benefits is long, it is more difficult to successfully transverse through the diffusion process. However, if the time delay is shortened then adaptation may be quicker. This is not a guarantee, though. Changes in behavior occur over time and those going through this

process may have to experiment with different behaviors or variations of behaviors before a behavior becomes automatic (Bandura, 1986). While this adaptation process may be difficult to conduct in a formal training program, the individual through their own self-knowledge development and self-training process may be able to effect these changes.

Innovations and behavior modeling about host cultures that are easily learned can be transferred to the outsider's daily behavior with relative ease as compared to those that are complex as noted above. For instance, this researcher has spent considerable time in Scotland and quickly learned the use of the word 'cheers' is a euphemism for most greetings, to say thank you, and the word cheers can be applied to just about any situation in much the same way 'mahalo' is used on the Hawaiian islands. However, even after new social behaviors have been adapted to meet the host culture conditions, it may still take some time for some of these behaviors to become routine (Bandura, 1986).

In contrast to Bandura, Hofstede (1980) believed that people rarely adapt the values of outsiders based on direct observation. Rather Hofstede believed people and their behavioral norms are more apt to change over time through interaction with the technological, ecological, economic, and hygienic environments. Further in addressing social change, Hofstede writes that one method of changing or adapting to new mental programs is to get people to change their behaviors first and that this can be accomplished by changing the environment as it relates to learning new behaviors (Hofstede, 1980).

As a component of behavior and socialization, culture also plays a role. Hofstede writes that it is difficult for people who remain ethnocentric to understand the role culture plays in socialization. It takes a prolonged stay in foreign countries interacting with host country nationals to realize not just the obvious differences in culture, but also the subtle nuances of the

other culture. These are not necessarily faults of the sojourner; it just takes time to overcome the programming of one's own culture (Hofstede, 1980). It should be noted that a prepared adult is capable and confident in a specific context such as understanding one's own culture. But if the context changes, the individual may continue as they have in the past as it is the only way they know. Acculturation is a complex process for expatriates and time is just one process factor.

Social Networking

Social capital theory describes the interrelationship the expatriates have within their network as channels for the movement of social resources in terms of informational, instrumental, feedback, and emotional support of expatriates (Adler & Kwon, 2002). Further, social capital theory makes note of the difference between strong tie relationships which includes more frequent and more emotional contact with host country nationals and experienced expatriates within the host country setting and weak tie relationships where expatriates have less contact with host country nationals or current expatriates. In other words, the weak-tie relationship expatriates tend to avoid situations requiring more contact with host country nationals and cultural interaction. The results are that those with stronger tie relationships tend to be more successful in cross-cultural adaptation than those with weaker ties to host country nationals and the host country culture (Osman-Gani & Rockstuhl, 2008).

Cultural Understanding

As noted earlier expatriate academics are essentially volunteers. This is not to indicate they are not paid professionals, but rather these professionals generally are under no professional obligation to work in foreign countries. However, Richardson and McKenna (2005) noted that self-initiated expatriates within business and industry may be motivated by the belief that taking on expatriate positions can have a long-term benefit to their respective careers.

Cultural understanding at a foreign university goes beyond the classroom. An expatriate academic can feel quite alienated ‘in the break room’ when surrounded by host country nationals. This can be even more problematic in a country where the national language is foreign to the expatriate’s language. If, in this case English, there was some form of common language support unit, it may make the transition to a host culture university more manageable. In a direct comparison to business and industry, this would equate to having ongoing training of the expatriate to ensure they understood the host culture and were better able to adapt (Ashamalla, 1998, Bodycott & Walker, 2000, Herman & Bailey, 1991).

Among well-known opportunities is the Fulbright Scholarship program which is designed to give scholars from the United States opportunities to share their expertise in foreign classrooms as well as bringing international academics from other countries to study and teach within higher education in the United States (Council for the International Exchange of Scholars, 2007). The Fulbright Program is a competitive program where those selected must meet very strict eligibility requirements

http://www.cies.org/specialists/Joining_The_Roster/Eligible_Criteria.htm. Meeting the requirements does not guarantee acceptance. Those applying for a Fulbright Scholarship must already have a terminal degree and prove they can meet teaching and research requirements while on their proposed expatriate assignment. This may include foreign language proficiency (CIES/Fulbright Scholarship Program, 2007).

Dr. Abel F. Adekola of the University of Wisconsin-Stout and Chair of the Department of Business is a former Fulbright Scholar. His selection process included identifying three potential scholarship opportunities including his final Fulbright destination in Vilnius, Lithuania. While he can be considered a self-selected expatriate academic, he also went through a very rigorous

selection process used by the Fulbright program. Prior to departure to Vilnius, his formal Fulbright pre-departure training was conducted in Washington, DC. While the training was general in nature to all Fulbright Scholars for the upcoming term, the training also included breakout sessions for those going to specific countries or regions of the world. This is a very common practice for the Fulbright Scholarship Program and is well documented (A. Adekola, personal communication, September 20, 2007, and May 5, 2008).

Cultural Socialization Relative to Expatriation

Varner and Palmer (2005) defined culture as “socially transmitted beliefs, behavior patterns and values that are shared by a group of people.” Further, culture “influences how we negotiate business contracts and organize our businesses” (Varner & Palmer, 2005, p. 3). A similar definition noted that culture is patterned ways of thinking, feeling, and reacting to the acquired transmitted symbols constituting the distinctive achievements of human groups (Kluckhohn & Kroeber, 1963). Developing an understanding of one’s own culture takes place over a lifetime. Hofstede (1980) defined culture as the collective programming of the mind. In each instance, culture is noted as something developed over time and through some form of interaction. For example, given two individuals from different countries; one born and raised in Iowa in the central United States and the other in Ukraine, it is safe to presume that the culture in which each grows up is considerably different and that their respective programming of the mind will differ in many respects from each other.

In a meta-analysis of cultural adaptation studies, Varner and Palmer (2005) argued that there is a component missing when it comes to understanding culture as a positive factor for a successful international experience. The researchers noted cultural self-knowledge, using the term self-reference criterion interchangeably, is a salient component to successfully adapting to

host cultures, all people have a self-reference criterion and that others' behavior is judged based on their own cultural self-knowledge. For example, someone from a monochronic culture generally focuses on getting one job done on a timely basis and that time is viewed as a commodity. While someone who is polychronic in nature, where the focus is on the ability to work on many tasks at one time, would be considered as inefficient to the monochronic person (Varner & Palmer, 2005).

Understanding of culture and society from this self-reference criterion can lead to conflict when trying to adapt or accept another culture. Gupta (1992) lists several steps expatriates should use when attempting to function in another culture. The first is to understand their cultural orientation and what they consider acceptable behavior. Next is that expatriates or those training to become expatriates need to overcome the desire to look at their own cultural self-knowledge as universal and to avoid judging others using their cultural self-knowledge. Varner and Palmer (2005) state that people generally do not reflect on their own cultural behavior because it is something they have learned about since birth. In other words, as humans in one culture, we do not consider how culturally different people view us, which can lead to sending a negative message to host culture nationals and the loss of face on the part of the expatriate.

Based on their research of cultural self-knowledge, Varner and Palmer (2005) did note that cultural self-knowledge plays a significant role in expatriate development and specifically noted a four-stage process for expatriate selection and development. Stage one is to screen potential expatriates to identify those who would be predisposed to successful acculturation and to weed out or eliminate from consideration those who would not. The second stage is focused on the employee studying their own cultural preferences through classroom and experiential learning. This stage forces the employee to become aware of their own culture self-knowledge and to be

able to recognize it may not mesh with those of different cultural backgrounds. Stage three is a study of other cultures and their respective reactions of other cultures including the ‘what’ or the visible aspects of the other cultures and the ‘why’ or the less visible aspects of other cultures. The goal here is to acquire culture specific skills, develop an intercultural competency, and the ability to negotiate within the host country and with members of the host culture. Finally in stage four, the expatriate goes through adaptation strategies specific to the other culture. Expatriates need to be made aware of their resistance to change in this stage and they may need to ‘unlearn’ old practices and become very aware of their own preferences (Varner & Palmer, 2005). Expatriate also need to be aware of the possibility of culture shock.

Culture shock has been identified with stress induced reactions to living and adjusting to a new culture (Sims & Schrader, 2004). Several authors have addressed culture shock and the ability of the expatriate to overcome culture shock in order to have a more positive expatriate experience or, to become overwhelmed within the host culture by not being able to adjust and ultimately have an unsuccessful expatriate experience. Black and Gregersen (1991) described culture shock as stress induced by behavioral expectation differences within the host culture. Solomon (1994) described culture shock as “An emotional and psychological reaction to the confusion, ambiguity, value conflicts, and hidden clashes that occur as a result of fundamentally different ways of perceiving the world and interacting socially between cultures” (p.52).

Culture shock has also been described as the initial wave of emotion the expatriate experiences upon arriving in the host country or that culture shock can occur over time as an expatriate experiences more of the nuances of a host culture, have adjustment problems and a sense of “frustration, depression, and homesickness” (Sims and Schraeder, 2004, p. 74). Expatriate failures’ number one cause is the inability of the expatriate to adjust to a host culture.

Depending on the host country location, failure rates range from 16-40 percent on average and for some countries, the failure rate is as high as 70% (Sims & Schrader, 2004). The average cost in terms of training a business expatriate is approximately \$80,000.00. While this cost is significant, the cost of an expatriate failure to adjust to a host culture can reach over \$1 million (Shannonhouse, 1996), and the average annual amount of money lost can reach \$2 billion or more (Punnett, 1997).

Of related interest is the expatriate process many professionals go through when on an international assignment. Many go through a 'honeymoon phase' of being in a new country. However, after the honeymoon phase is generally when culture shock sets in for many expatriates and/or their traveling family members and any training that incorporates this adjustment phase can help expatriates overcome culture shock (Sims & Schraeder 2004).

Sims and Schraeder (2004) propose a number of ways to reduce the stress of culture shock. One is to ensure that the expatriate will have the opportunity to go on pre-expatriate or pre-departure visits. However, it is possible a pre-departure visit could become more of a tourist visit. The visit must be well-planned and provide firsthand information on the host country culture, the work environment, and other day-to-day activities the expatriate may encounter. Another is pre-departure cross-cultural training as a key success factor to avoiding culture shock. It can cost up to \$80,000 to provide "rigorous in depth cross-cultural training" (Harrison, 1994). It is easy to determine the costs of training and the time needed may be too long, but the cost of expatriate failure, can be a significant multiple of the cost of training (Black & Gregersen, 1999). Finally, they recommend continued post-arrival orientation to help the expatriate acclimate to their new host culture and to provide host culture social support (Sims & Schrader, 2004).

Expatriate Academic Acculturation

Researchers have noted the lack of empirical research on those who are self-selected expatriates including Osland (1990 & 1995) and Peltonen (1998). Richardson and McKenna (2000) have addressed the topic of expatriate self-selection for academics in detail by noting current expatriate literature has focused on those within business and industry including managers and other professionals sent on expatriate assignments. Many of these professionals are going on specifically assigned expatriate assignments where there is a clear need to send a home country professional to fill a host country position. Business and industry professionals who self-select are an under-researched group and even less is known about those in higher education as a self-selected group and their potential to have a positive cultural adaptation experience as an expatriate academic. Addressing higher education more specifically, they noted that "...at a time when internationalization is a major trend in higher education very little is known about expatriate academics as an example of self-selected expatriates (Richardson & McKenna, p. 210)."

Richardson and McKenna's qualitative research focused on self-selected academics from the United Kingdom. Because expatriate academics as a respondent group have not been thoroughly researched, there are no collaborative works available to confirm their conclusions. However, their research does provide a research base upon which to build. Their research noted that 30 academics had left Great Britain and were teaching in New Zealand, Turkey, Singapore, and The United Arab Emirates (UAE) and are inclusive of their respondent group (Richardson & McKenna, 2000). Four major metaphors were identified describing academic expatriates. The first two metaphors can be classified as motivators to pursue an expatriate academic position. While the latter two addresses the personal characteristics of the individual. The academic as an

explorer is someone who is driven by the desire to explore the world more so than the desire pursue professional opportunities. Teaching in the international environment was the enabler to explore. Next is the expatriate as an academic refugee as someone who wants to 'escape' their current location as an academic. The main reason for those escaping was to pursue professional opportunities not available within their home country (Richardson & McKenna, 2000).

The expatriate academic as outsider is the third metaphor Richardson and McKenna (2000) noted. This expatriate is someone who felt like outsiders within their expatriate host culture. While the respondents from all host communities felt some form of isolation within the host culture, this was even more problematic for those in Turkey and the UAE.

Finally, the expatriate academic as a tightrope walker was identified as condition of the precariousness of their respective situation. The fear of losing their job was the key issue identified as an expatriate 'tightrope' walker. Partly because losing their job also meant they would have to leave the country where they were teaching unless they were able to find new employment within that host country. All respondents noted they needed to be careful within the work and national culture and how they acted and adjusted to the respective cultures. This most notably was the case for those in Turkey, the UAE, and Singapore as these respective national cultures are significantly different from the culture of the UK (Richardson & McKenna, 2000).

In what could be described as a confirmation of the expatriate as a tightrope walker, was a study conducted in Australia addressing international academics preparedness to meet the academic needs of their respective students. Over the past several years, Australian universities have had a growing number of international students and international faculty. The Australian Vice Chancellors' Committee has established guidelines for meeting these needs. This study was to assess the current pre-departure cross-cultural training of business faculty at three Australian

universities. Twenty professionals were questioned including the faculty, their respective supervisors and those involved with their cross-cultural training. The findings suggest that very little formal training is being conducted and that more needs to be done to complete international academic preparation to be effective international and expatriate educators in Australia. However, the authors did make note that informal mentoring and other communication of expatriates were taking place (Gribble & Ziguras, 2003).

Bodycott & Walker (2000) also addressed the issues facing international academics in their research. Their published work focused primarily on their experiences as English-speaking professors teaching in Hong Kong. Bodycott & Walker noted geographic location and language might be the key characteristics when hiring an international academic and suggested that a common historical belief of international academics is that the students within those institutions regardless of nationality and language should be the ones to adjust to the instructional style of the academic. The authors noted this is not an effective method of teaching and student evaluations of international academics have suffered as a result.

If hiring international academics is so problematic for institutions, then why would the institutions want to do this in the first place? For some countries, it is out of necessity such as it is in Canada where there is a significant shortage of Canadian higher education faculty available to meet the academic needs of a growing student population (Richardson, McBey, & McKenna, 2005). Many institutions of higher education noted in this study, particularly from the United States, Australia, and Singapore, made a connection between where the expatriate academic was from and where they had previously conducted academic activities with the desire to actually hire international and expatriate academics (Richardson & Mallon, 2005). Data specific to the international academics in Canada noted there is a belief among the international and expatriate

academics and the institutions they work for in the transferability of knowledge and experience within the learning environment. However, this study noted the connection between international academic expertise and research ability may not be a driving factor leading to faculty success or hiring in Canada. The driving factor may just be the need for more faculty members. The authors noted additional research needed to be done to make this conclusion (Richardson, McBey, & McKenna, 2005).

One item Richardson, McBey, and McKenna (2005) noted in their research was the overall attitudes of the Canadian nationals in respect to their American counterparts teaching at the surveyed Canadian institutions. The authors believed that many of the American academics were novice in their understanding of Canada and higher education as an institution in Canada. However, among the expatriate (non-Canadian) and international academics there was an overall favorable attitude towards all cultures represented.

Finally, with respect to adaptation issues in Canada, expatriate and international faculty members are granted one of two kinds of permits to work. International faculty members are academics from foreign countries who have purposefully accepted a permanent position within a host country. One is a Landed Immigrant/Permanent Residence, which grants a faculty member to most of the rights Canadian citizens enjoy such as access to the health care system, education for their children, and if appropriate the ability for the international academic's spouse to work in Canada. The other is a more restrictive standard work permit, which does not allow for some of the rights as noted above. For those expatriate faculty granted the work permit, these restrictions were generally not granted and they proved to be somewhat problematic in adapting to the Canadian system (Richardson, McBey, & McKenna, 2005).

Some universities are looking for primarily English-speaking expatriate academics to help prepare their students for the challenges of working in the international business environment where English is the dominant language. Still, other institutions are seeking qualified faculty to temporarily replace domestic faculty who are pursuing higher degrees, sabbaticals, or research agendas (Bodycott & Walker, 2000).

As noble as this may seem, many of those English-speaking expatriate academics are ill prepared for cultural adaptation to their new host environment at their respective universities and the host culture. Bodycott & Walker (2000) write that teachers cannot use an identical instructional approach to the one they would use in their domestic learning environment. Bodycott & Walker suggest one key to success is an inter-cultural understanding for the expatriate academic. The expatriate academic must move in the direction of his or her learners in terms of instructional methods and should make an effort to understand the host culture in general. This can go a long way to improving the overall instructional process and acceptance by students at the host university. Also suggested was students should share in the responsibility to try to understand the culture of their international educator (Bodycott & Walker, 2000).

Expatriation

Expatriate Selection and Training

Organizations want their selected expatriates to have a positive experience while on their expatriate assignment and to fulfill their professional expectations. Although, there is no one clear definition of a positive expatriate experience, there are multiple factors that can help identify who will have a successful expatriate experience. One of the key factors of success is the selection of the expatriate. While it may be nice to reward a successful domestic employee with an international assignment, this fact does not always mean they will have a successful

experience as an expatriate. Another is the training of the expatriate for their international assignment. While the job requirements are important to be aware of, it is the changes in culture and lifestyle that need more attention during the selection and preparation phases to help set the expatriate up for successful adaptation to their new culture.

Two key components of a positive expatriate experience should take place long before the assignment begins. These are the selection phase and the pre-departure training phase (Ashamalla, 1998). Ashamalla and Crocitto (1997), and Ashamalla (1998) noted five key abilities in their research that potential expatriates (i.e., business and industry professionals) should possess. First is cultural empathy and ability to appreciate the cultural traits, beliefs and behaviors of the foreign environment. Second is awareness of environmental (organizational) constraints and to be able to function within those constraints. Third is to have excellent interpersonal skills and the ability to use effective verbal and non-verbal communication skills. Fourth is the capability to have solid decision making skills. This is important when working in conditions that are isolated in comparison to the home country environment. Fifth, is a broad collection of necessary traits including language capability, adaptability, self-motivation, cultural sensitivity, and tolerance for ambiguity (Ashamalla & Crocitto, 1997; Ashamalla, 1998,).

It is during the selection and pre-departure training process that professionals with the potential for a positive international assignment may be identified. Gabel, Dolan, & Cerdin (2005) suggest a predictor of expatriate success occurs during the selection process. Gabel, et al. found the emotional intelligence of the individual as having a significant correlation to the performance of the expatriate while on assignment. Emotional intelligence is described as a “psychological concept that seeks to describe the role and relevance of emotions for intellectual functions” (p. 379). The research supported five success indicators potential expatriates should

be screened for. These are intrapersonal abilities, which is the ability to be aware of and understand others; interpersonal abilities, which address the individual's sense of empathy, social responsibility, and social relations; adaptability, which is the ability to understand and adjust to the world around the individual and to identify solutions to solve everyday problems; stress management, which is the ability to tolerate stressful situations and; general state of mind, which is the ability to have a positive and optimistic view of life (Gabel, Dolan, & Cerdin 2005).

Varner and Palmer (2005) write that cultural self-knowledge is a factor which organizations should look for in potential expatriates. Varner and Palmer identified four stages within the expatriate selection process and expatriation process which could be used as success indicators. In Stage 1, the individual is screened for personality characteristics identified as potential success factors including flexibility, a sense of adventure and openness. Stage 2 individuals are asked to concentrate on their self-awareness including their preferences, likes and dislikes. In Stage 3 the prospective expatriate studies the culture of the proposed host culture and their perceptions of the culture to identify preconceived notions and to find ways of reducing or eliminating the impact of preconceived notions. Finally in Stage 4, the potential expatriate explores adaptation strategies to the host culture. The intent throughout this process is to insure the organization identifies a good candidate for expatriation.

Unfortunately, not all organizations go through an expatriate identification process which will screen for the potential of a successful or failed expatriate assignment. Often those professionals who are offered an international assignment have been successful in the home market and it is expected that these success skills will apply to expatriate assignments as well. Those selected for international assignments generally understand their respective work roles and other job related competencies, but unless they have adequate prior experience in a host culture

and relevant cultural training they are not often adequately prepared to be immersed in that particular cultural environment (Ashamalla & Crocitto, 1998; Gabel, Dolan, & Cerdin, 2005; Tye & Chen, 2005).

In another study reviewing how expatriates are selected by an organization, Anderson (2005) identified three topics from which she was able to develop a survey instrument. She used technical competence, interpersonal skills, and domestic circumstances as expatriate selection factors. Anderson's respondent random sample group included representatives from private (business and industry), public, and non-governmental organizations and all respondents were either human resource managers or senior human resource officers as well as repatriated expatriates from the same organizations as the human resource professionals. The human resources professionals were included in this research because they generally have access to expatriate performance reviews and the selection process (Anderson, 2005).

Finally, the human resource professionals addressed family/domestic partner inclusion in the selection process. Some of the private sector organizations used interviews, informal discussions with managers and discussions with employees and partners to make an assessment. However, inclusion of a domestic partner was relatively rare. One human resource professional indicated that the timing of adding domestic considerations is difficult and that dealing with discrimination laws can hinder the process. Yet another private sector organization makes it very clear that at no time were domestic circumstances considered as part of the selection process indicating that domestic issues are solely up to the applicants or other potential expatriates and all expatriate selection decisions are made based on professional objectives (Anderson, 2005).

The repatriated respondents in the Anderson (2005) research above were asked what their respective companies' process was for selection. The repatriates indicated that their technical

competence was the most influential factor during selection for those in private enterprises. For those repatriated from non-governmental organizations, contributing factors included psychological suitability, partner's career, children and other family circumstances as a decision factor in the selection process (Anderson, 2005). Anderson's research findings as noted above tend to reinforce the need to use a proven expatriate selection process. However, just as in the other works mention, Anderson does not address selection processes for academic expatriates.

Wycliffe Bible Translators, which is a non-governmental organization that specializes in Bible translations and missionary work throughout the world, uses a self-selection process where applicants are screened as individual applicants and not against others. In other words, the application process is not competitive in nature. Applicants are either individuals or couples that apply to the organization without knowing where they would be geographically assigned. An administrator is assigned to each applicant and the administrator will talk with the applicant, the applicant's respective faith leaders or others the administrator believes would have knowledge of the applicant. Applicants must be physically able to perform the duties of a missionary and meet the other duties expected. In the United States, accepted applicants go through a two-week training camp where Wycliffe Bible Translators doctrine and inter-cultural communication are included in the training curriculum. The applicant would then travel to their general global region for more country and culture specific training. This process of including multiple data sources during the selection process has been successful for Wycliffe Bible Translators. This would include the applicant's local pastor or other faith based leader, colleagues of the applicant, and personal references. Positive comments from these and/or other reference sources including the comments of the applicant help Wycliffe Bible Translators in determining the applicant's potential to meet the expectations of those selected to expatriate. Applicants are expected to stay

on their expatriate assignment at least one year and many spend considerably more time either in one country or region of the world or multiple global regions according to Mrs. Myrle Canonge, Assistant to the Director of Personnel Administration of Wycliffe Bible Translators, USA (M. Canonge, personal communication, August 23, 2007).

Asked if expatriates tended to be successful, Mrs. Canonge indicated that the majority of expatriates do stay for their entire assignment and that many have completed multiple assignments. Mrs. Canonge believed the extensive screen process was sufficient to meet the needs of identifying who would or would not be able to complete their international assignments (M. Canonge, personal communication, August 23, 2007).

As noted earlier, the Fulbright Scholarship program for post-doctoral teaching and/or research uses a self-selection approach in combination with a competitive process where applicants are screened based on their detailed and completed application addressing their teaching, research, other professional experiences and the ability to speak the language of the country they are proposing for their scholarship experience. The applicant must show a propensity for understanding the culture of the region to which she or he is traveling as an expatriate. This would come through in the application process from the applicant's self-evaluation as well as the applicant's references. Prior to leaving, the Fulbright Scholar is invited to Washington, DC for an orientation seminar. Their respective families may attend, but associated costs for the family are not paid for by the Fulbright Program (Council for International Exchange, 2007).

Still, other international and expatriate programs have different selection processes. The Wisconsin in Scotland Program (WIS), a consortium of Wisconsin comprehensive universities sends faculty from each of the respective universities who have applied to teach for one full

semester or summer and on occasion for an entire academic year. They must submit a minimum of five courses they could teach, along with a detailed listing of any previous international experience, if they have worked with student organizations, or have had other experiences they think would make them a good candidate to teach at the WIS site near Edinburgh, Scotland. The respective university international education directors along with the WIS program management team review the applicants, the applicant's respective discipline, the rotation of previous classes taught at WIS, and other potential indicators of a successful expatriate experience. Those selected then travel to Scotland to teach students from the Wisconsin consortium universities and other UW-System institutions that have also traveled to Scotland. The student population is not limited to the consortium institutions. The students can be from any of the 13 four year comprehensive universities and selected two year colleges in Wisconsin. The faculty members selected attend a one-day training event held at UW-River Falls from where the program is managed. This training is open to the selected applicant and if appropriate, their traveling partner. It is important to note that the selection process considers the applicant and not potential travel companions (Wisconsin in Scotland, 2007).

From a business and industry standpoint and in order to ensure that the selection process is effective, many organizations have written job descriptions alerting recruits to the potential for international work assignments. Others use formal testing and interviews to gage the potential for an expatriate to be successful (McDonald, 1993). Evaluations of potential expatriates by repatriates, those who have returned from an international work assignment, can also be used to determine potential for success. Candidate self-evaluations and having sufficient time to evaluate candidates are also important (Ashamalla & Crocitto, 1997; Ashamalla, 1998).

The expatriate's family should also be included in the expatriate selection and training process to the extent possible (Ashamalla & Crocitto, 1997; Ashamalla, 1998). This is an area where the corporate world has lagged when addressing expatriate needs. Only 40-52 percent of corporations include an expatriate's spouse in the selection process (Ashamalla, 1998). Related statistics pointing to the lack of adequate selection include that only 50 percent of organizations consider cultural empathy and interpersonal skills, 60 percent consider the candidates ability to adjust, 44 percent use the expertise of an international specialist in the selection process and a significantly high 81 percent of organizations surveyed indicated that an international position was filled because an accessible candidate was found, not necessarily a qualified candidate that was ready to expatriate (Ashamalla, 1998).

A key factor in the selection process is the candidates' ability to recognize their own abilities to be a successful expatriate. Those who have been repatriated from a successful expatriate experience are likely to be successful again. They have gone through the learning process and recognize their ability to learn about new cultures and cultural/organizational expectations and how to apply these newly learned skills in a new international experience.

Finally, there are various expatriate selection instruments that business and industrial organizations can use to identify those with the potential to be successful expatriates. Some can also be used as a pre-departure testing program to identify training needs. One such instrument used for business and industry expatriate selection is the Intercultural Development Inventory (IDI). This instrument was developed and validated by Dr. Milton Bennett of the Intercultural Communication Institute and a faculty member at the ICI/University of the Pacific Masters of Arts in Intercultural Relations. The instrument was first validated in a review of interviews with 40 sample respondents representing cross-cultural and situational diversity. As the IDI has

become more prevalent as a selection tool, it was revised to 60 questions and administered to 591 respondents along with the previous IDI. The resulting factor analysis noted the IDI met or exceeded standard reliability criteria (Hammer, 1998). “The IDI is more than a trainer feedback mechanism. It is a 60-item questionnaire, which can provide a trained interpreter with individual or group profiles of intercultural sensitivity. These profiles can then be translated into individual action plans or training programs for individuals, groups, or organizations” (Greenholtz, 2000, p. 412). Similar instruments including the Cross-Cultural Adaptability Inventory (CCAI) by Kelley and Meyers, the Foreign Assignment Success Test (FAST) by Black (1988) and the Behavioral Assessment Scale for Intercultural Communications (BASIC) by Olebe and Koester (1989) are all designed as selection and pre-departure screening instruments aimed towards the screening and selection of professionals within the business environment. The above instruments do not address self-selected expatriate academics and may not be a realistic instrument to give to academics as the instruments are clearly geared for those in business.

Pre-departure Preparation and Training

Potentially as important as selection is the pre-departure training of the expatriate for their assignment. And if possible and appropriate, the family or significant other of the expatriate should be involved in the pre-departure training process. Research has noted that pre-departure training in general can have a significant impact on expatriate success and that cross-cultural training can have significant impact on expatriates within business and industry (Shim & Paprock, 2002; Merlo, 2000; Jacobs, 1998; McDonald 1993). Some organizations do not engage in pre-departure training for short-term expatriate assignments because of skepticism about effectiveness of short-term assignment training, time limits from selection to departure, the belief that successful home country managers will be successful in the international assignment, and

cost effectiveness. In reality though, research indicates this is a short sighted view because the expatriate is changing jobs and a way of life (Shim & Paprock, 2002; Ashamalla, 1998).

The pre-departure preparations should include a briefing of the work and living related environment in the host country and address areas of concern including travel and safety issues (Tye Ashamalla & Crocitto, 1998; Gabel, Dolan, & Cerdin, 2005; Tye & Chen, 2005; Varner & Palmer, 2005). In designing a training program, organizations need to take a proactive approach. Training should include the specific needs of individual expatriates as well as their families. Cross-cultural and language training are two areas of training need that can be critical to expatriate success. Even if an expatriate is going to an English-speaking country, there will still be language issues to address. Cross-cultural training should also address the social and behavioral expectations of the new environment. There are several models for cross-cultural training and many have similar components.

Hogan and Goodson (1990) in research of expatriates and the organizations the expatriate worked or work for identified topics that should be included during cross-cultural training of expatriates. Their respondent group was a sample of business and industry professionals. In order to support a successful expatriate assignment, Hogan and Goodson (1990) identified the following five expatriate training activities:

- “1. Look at the ways in which culture affects work relationships. 2. Viewing the ways in which understanding differences can lead to teamwork and productivity. 3. Reviewing American, or respective home county, values and assumptions concerning issues of individualism/collectivism, power distance, communications and identity, and how these values and assumptions compare to those of the host country. 4. Provide a forum for expatriates to appreciate their own roles in their firm’s globalization processes. 5. Provide

information concerning the host country's history, heritage, religion, social norms, political ideology, economic conditions, demographics, customs, and living conditions” (Hogan & Goodson, 1990, p. 52).

Factors Contributing to a Positive Expatriate Experience

In their study of expatriates in Hong Kong, Harrison and Shafer (2005) hypothesized that work adjustment, cultural adjustment and interaction adjustment were significant predictors of withdrawal conditions, passive task neglect, active task avoidance, time to proficiency and as positive predictor of leader-team exchange. Leader-team exchange is the ability of the expatriate to exchange or initiate meaningful exchanges with host country colleagues. Harrison and Shafer's research questions were: What are the relationships among various success criteria?” and “What constitutes a successful assignment for an expatriate?” (p. 1445). The methodology included making a comparison of expatriate characteristics from 36 expatriate adjustment studies with validated scales. The data noted the ability to adjust to the host country work environment was a predictor of withdrawal, task neglect and task avoidance altogether. However, it was also noted that inadequate cultural adjustment had more of an impact on leaving the expatriate assignment than it did on task-related effort (Harrison & Shafer, 2005).

In a meta-analysis of 65 empirical studies of business expatriates Tye and Chen (2005) identified four factors of success predictors; experience previously working internationally, extroversion, stress tolerance, and gender. Of the four predictors they identified, extroversion and stress tolerance, were identified as being closely related to the potential for expatriate success (Tye & Chen, 2005).

Extroverts are generally sociable, assertive, have an outgoing personality and are usually able to get along with others in familiar and unfamiliar environments. The success factors here

are the desire to communicate and establish relationships with others. This ability helps expatriates to adjust to the new working and cultural environment. The researchers found that there is a positive correlation to extraversion and adjustment and that there is a negative correlation to extraversion and the desire to terminate the expatriate assignment before the scheduled end (Tye & Chen, 2005).

Stress tolerance was another key predictor of a potentially positive expatriate experience. Adapting to a new job in a new culture can be very stressful and the ability to adapt to host cultures contributes to stress reduction and that the expatriate will be able to maintain a sense of well-being in the face of cross-cultural differences and changes within the host environment. The authors noted that in self-reporting, expatriates indicated that the ability to handle stress can be the difference between an average expatriate and one who has an all-around positive experience as an expatriate (Tye & Chen, 2005).

In summation, research indicates that stress tolerance, extroversion, proper selection, and pre-departure and continuing cross cultural training for the expatriate employee and their family, are all contributing factors for a successful expatriate experience for those in business and industry.

Expatriate Failure

Expatriate failure and the causes of failure have been extensively studied for those in the business and industrial environments. More than one definition exists for expatriate failure. One simplistic definition is that expatriate failure occurs when the expatriate leaves the international assignment before the scheduled termination date (Tu & Sullivan, 1994). Also addressing early termination as a failure factor, another study noted that “assignments from which expatriates had

to be brought home earlier than planned as a result of problems experienced by themselves or their families, or problems they have created for the organization” (Anderson, 2005, p. 568).

Anderson noted this is not a quite clear definition of expatriate failure because it is tied to the timing of the expatriate leaving their respective assignment. Anderson also noted this definition does not take into account additional reasons for failure such as culture shock, work related differences, isolation, homesickness, housing, schooling, and so on (Anderson, 2005). Yet, not all expatriates who fail in their assignment return home early. As noted under success criteria, withdrawing from active work involvement, the inability to adjust to the culture, actively or passively avoiding tasks and taking a significantly long time to reach proficiency are all failure factors (Harrison & Shaffer, 2005).

Expatriate failure is something that many organizations work very hard to avoid. The number one reason for expatriate failure is the inability of the expatriate and/or their family to adjust to the new culture (Sims & Schraeder 2004). Tye and Chen’s (2005) study noted that 10-20 percent of expatriates return to the home country sooner than their scheduled return time and that approximately one third of those who do not return early, do not meet their performance expectations.

Other causes of expatriate failure include the inability of the spouse to adjust, the inability of the expatriate to adapt to a different physical working environment, the expatriate’s personality or emotional immaturity, other family related issues, the expatriates inability to meet the work responsibilities of the international assignment, the lack of technical competence, and the lack of motivation (Tung, 1987).

A study of 143 expatriate employees and 94 supervisors from a United States based information technology company was done by Caligiuri (2000) of what leads to a positive or

negative expatriate experience that could lead to expatriate failure. Caligiuri used personality characteristics to determine what impact each respective characteristic had on two criteria of expatriate success. These two criteria are the desire to prematurely terminate the expatriate assignment and supervisor rated performance on the expatriate assignment. Caligiuri proposed five personality characteristics: extraversion, agreeableness, conscientiousness, emotional stability, and intellect or openness (Caligiuri, 2000). The personality characteristics were her independent variables and the two criteria were Caligiuri's dependent variables. Her statistical process was to report descriptive statistics, and to complete regression analyses on the data.

The data was tested for linear relationships and a correlation matrix was completed. As she hypothesized, Dr. Caligiuri noted that

“The extroversion matrix for the independent and dependent variables was calculated and that, extroversion, agreeableness, and emotional stability were negatively related to the expatriates' desire to terminate the assignment. In addition, as hypothesized, conscientiousness was positively related to supervisor-rated performance” (Caligiuri, 2000, p. 81).

Regression analysis was conducted on the two criterion variables of the desire to prematurely terminate the expatriate assignment and supervisor rated performance on the expatriate. The first regression analysis predicting expatriates' desire to terminate their assignments indicates,

“personality does explain a significant amount of variance ($\text{Adjusted } R^2 = .11, p < .01$).

In a similar pattern to the bivariate correlations, extroversion and agreeableness predicted desire to terminate the expatriate assignment. Emotional stability, however, was not significant in this regression equation. In the second regression analysis predicting the

supervisor-rated performance, personality (in particular, conscientiousness) was also found to account for a significant amount of variance (adjusted $R^2 = .09$, $p < .05$)” (Caligiuri, 2000. pp. 82-85).

In the each case for extraversion, agreeableness, conscientiousness, and emotional stability, there was at least some partial evidence to not reject the respective hypotheses. In other words, there is a correlation to expatriate desire to terminate an expatriate assignment and the supervisor performance rating. However, the hypothesis on openness or intellect was not rejected. Caligiuri suggests that this might be attributed to a lack of understanding on the topic. That the respondents viewed this topic area as a measure of personal intellect as opposed to the intended perceptual ability (Caligiuri, 2000).

Caligiuri has also identified three factors of success or failure determinants. The first is expatriate adjustment, which is the process of acclimating to the new work environment and the national culture of a country or global region and the ability to interact successfully with people from that foreign country or regional environment. Second is performance, which is related specifically to the work environment. Many expatriates are judged on their work performance as a success factor (Caligiuri, 2000). However, failure to adjust to the culture can have an impact on professional duties. Finally, turnover addresses the length of time an expatriate spends on their assignment. Researchers and organizations have used past expatriate turnover as a measure to predict future turnover and the characteristics that would lead to a higher turnover rate (Bolino & Feldman, 2000). The other side of success is failure or somewhere between failure and a positive expatriate experience. Culture shock is also a contributor to failure (Sims & Schrader, 2004).

Bodycott and Walker (2000), and Richardson and McKenna (2005), noted that spoken language communication difficulties and the inability to adapt to host country instructional

environments were causing stress for international and expatriate academics. In addition to Bodycott and Walker (2000), Richardson and McKenna (2005) went on to note that these issues were even more problematic for international academics in tenure-track or otherwise long-term positions and that the inability to adapt to the host culture community and/or university could force an early exit from the international posting.

In summation, there are several factors that could lead an expatriate to fail or underperform in their expatriate assignment. Among these causes are poor expatriate selection processes, the inability to effectively communicate within a host culture, a lack of pre-departure training or continued cultural adjustment training when on the expatriate assignment, the inability of the expatriate and/or the expatriate's traveling family to adjust to a host country culture, the inability to adapt to the work environment, introversion, and culture shock.

Literature Specific to Expatriate Academics

As noted earlier, there are many different teaching abroad programs and faculty may have a training need as much as those from business and industry. However, there is little known about expatriate academic training.

In the *Journal of Education for Business*, Bonnie Garson has written of her experiences teaching at an English-speaking university in Cairo, Egypt. When Dr. Garson went to research faculty expatriate training, she found very little useful information. She writes "There is a dearth of research or training for expatriating professors and their families" (Garson, 2005, p. 322). Dr. Garson's only formal training prior to departure was in the books and literature she read about Egypt and the capital city of Cairo. There was no other formal training scheduled with the exception of a one-week orientation to the university Dr. Garson was going to be teaching at.

Since initial expectations of what life in Cairo would be like were not realized, Dr. Garson began to experience culture shock.

In the case of longer term expatriate academic assignments, getting over culture shock can be time consuming. If not able to adjust within a reasonable time frame, failure is possible. However, Adler (2002) noted that it is possible for expatriates to make adjustments on their own over time. “After three to six months, most expatriates escape their culture shock and begin living a more normal life abroad. Little by little, they learn what the new culture considers important and what it considers meaningful” (p. 234). Unfortunately for academics on shorter assignments, this time frame could be too long to have a positive adaptation experience within a host culture environment.

There are other differences between expatriate academics and the host culture that can prove to be a significant barrier to adjustment. Many non-United States based universities that hire generally English speaking expatriate academics are looking to fill short and long-term instructional academic needs. For example, post-colonial Hong Kong has been hiring more English-speaking academics to replace staff on leave or who are working on advanced degrees, to fill expertise gaps, to cover for sabbaticals, or to add to discipline areas with content not currently or adequately covered. These academic members may also experience culture shock and the isolation of being away from family and familiar surroundings. In the Hong Kong culture, English-speaking expatriate academics have additional adjustment problems to try to work around. Language barriers, being seen as a foreigner with ideology not consistent with the host culture, and a value system that is not consistent with the host culture are issues these faculty members have to contend with (Bodycott & Walker, 2000).

Bodycott and Walker also addressed the issue of student expectations. In their experience of being expatriate educators from Australia, it was their intention to apply their preferred teaching methods and the students would then have to make the adjustment to the instructional style used. However, this presumption was quickly contradicted. Bodycott and Walker argued there needs to be an inter-cultural understanding of teaching methods and it is the teacher that needs to make the first move by adjusting their attitude of the instructional environment. Also noted was that students should also play a role in this inter-cultural environment thus making the experiences a shared one (Bodycott & Walker, 2000).

It should be noted faculty may play a significant role in the development of their students' adaptation to a new culture. Having a faculty member who understands cultural adjustment needs, may hasten the transition to a successful learning experience for study abroad students or students within the host culture of the expatriate academic. Yucas, in the journal *Advances in International Marketing*, writes that faculty members are the first contact of the cultural adaptation phase for students in study abroad programs (Yucas 2003). In a more problematic example of the need for good cultural adaptation training for faculty and students is from Lane (2003) addressing the preparation of some students to be members of a greater global society. Lane noted Americans don't know enough about the world in which they live and the International Education Task Force calls for a national effort to reverse this trend (Lane 2003).

One study noted the term 'transnational education' as a term to identify the movement to teach in other countries. Of interest however, is that an instructor does not have to leave their home environment to teach in another country. Communication technologies have made this possible (Gribble & Ziguras, 2003). A study of Australian business discipline academics sought to identify the formal and informal training of international academics teaching within many

countries of Southeast Asia. Gribble and Ziguras (2003) noted that very little formal training was completed, while there was significant informal mentoring happening within the instructional ranks. They did note that in many of the larger populated areas of Singapore, Hong Kong and Kuala Lumpur that within the instructional environment, there was little need to adapt since the students were familiar with Western instructional practices. However, within greater China and Vietnam, there was the belief among students that the expatriate academics should have a better understanding of the local culture (Gribble & Ziguras, 2003). This study is notable because the teaching assignments of the business faculty are for short-term expatriate assignments where the instructional timeframe averages for two weeks up to three times a year.

The final conclusions of this study of Australian business faculty noted that there is significant interest in growing international programs, and that teaching internationally is a significant way to develop and have an international presence. However, there was very little interest within the universities to conduct formal pre-departure cross-cultural training for traveling academics (Gribble & Ziguras, 2003).

For her dissertation and subsequently published research in the journal *Career Development International*, Dr. Julia Richardson (2002, Richardson & Zikic, 2007) conducted a study of British expatriate academics using a qualitative set of interview questions format. To validate her research, Dr. Richardson used a sampling process by which potential respondents were identified through foreign university contacts. To reduce random error, Dr. Richardson's sample group included all known British expatriates teaching at the institutions selected. Ultimately only 14 men and 16 women agreed to participate. The data collection was in the form of in depth interviews with the objective to identify themes. The validation process was comprised of identifying themes early in the process to check for consistency to ensure the

questions being asked were appropriate. By using a strictly qualitative instrument with a low response rate, this instrument may not have led to conclusions that could be replicated. However, the data is able to provide part of the foundation for this research.

Richardson's (2002) objectives were to contribute empirical data about expatriate academics, to explore individuals' experiences as expatriates, to contribute to this under researched body of knowledge by focusing on what drives academics to expatriation, how expatriation is experienced, and how expatriation is evaluated for expatriate academics. Dr. Richardson's respondent group was British academics with expatriate experience in Turkey, New Zealand, Singapore, and the United Arab Emirates. Richardson's respondents all had been on their expatriate experience for at least one year, but less than ten years and all had elected to go on their expatriate assignment independently. In other words, they were not on a sabbatical or other form of formal exchange between universities (Richardson, 2002).

Dr. Richardson's methodology was based on interpretative interactionism which is a study of meaning, motive, intention, and feelings gained through experience (Denzin, 1992). She interviewed expatriate academics with the belief that people's expatriate experience is tied to the meanings they attribute to the expatriate experience and that these meanings come from the expectations of the expatriate themselves and the interaction they have with others (Richardson, 2002). To further validate her methodology and the questions of the research, Richardson selected a smaller group of expatriates from two of the countries where the respondent groups were located, New Zealand and Singapore. Richardson had intended to use expatriates from multiple nationalities, but determined through the pilot study that differences among cultures and the sheer size of the potential respondent group would be quite problematic within the scope of

her research and suggested that expansion to additional expatriate audiences would be an opportunity for further research (Richardson, 2002).

Richardson (2002) made note of several conclusions and themes from her research. She concluded that the use of the terms 'dominant drivers' and 'subsidiary drivers' as to why an academic would want to become an expatriate. Dominant drivers were more prominent and often used as the reasons for the decision to expatriate. The dominant drivers were adventure, travel, life change and family. Subsidiary drivers, or those with less importance, but nonetheless still offered as reasons for becoming an expatriate academic were traditional career themes, the potential for career advancement within the academic ranks and money. Richardson also concluded that expatriate academics were looking for a challenge, the ability to self-manage, a change in life by fulfilling ambitions and the chance offered by serendipity (Richardson, 2002). Further, Richardson noted that many of the drivers were interdependent with each other where one driver led to another in the decision to expatriate. Social interaction either as a current expatriate academic, within the structure of having a significant other, via social interaction with others such as colleagues, family or friends, or from a past expatriate experience also played a significant role in the decision to self-select or otherwise to take on an expatriate academic position (Richardson, 2002).

One of the key themes was the pervasiveness of social interaction and relationships in the home (Great Britain) and host country. Traveling family and the expatriate had significant influence on the other in this respect. Another theme of the Richardson research was the importance of the actions individuals took to learn about and engage a culture. She noted that successful academics tended to be engaged in the experience and processes of expatriation (Richardson, 2002). Expatriate academics were able to manage problems by adding a sense of

adventure to their experiences. Further, as the respondents were able to explore beyond their original confines, they were identified as becoming more 'active players' that has been noted in the overall body of knowledge of expatriates from business and industry (Richardson, 2002).

Another theme Richardson made was that the results did not offer a clear definition of expatriate academic success or failure. In fact, Richardson writes that from an individual expatriate academic perspective, there was no such thing as an expatriate success or failure (Richardson, 2002).

Richardson's implications for further research included the respondent group should be expanded beyond the use of British academics because this group may not be indicative of other nationalities, a comparative study of other nationalities may yield more and better data and that a longitudinal study of multiple nationalities may provide better information (Richardson, 2002).

Over time, many of those who have taught internationally have identified key tips for success as an expatriate classroom practitioner. Dr. Ken Ulrich (2005) of San Diego State University in San Diego, California has identified ten tips for teaching overseas. These tips address both academic and personal issues for the expatriating academics as they prepare and as they continue in their international expatriate experience.

Ken Ulrich's advice to expatriate faculty.

1. Be prepared to teach students from various backgrounds.
2. Know in advance what technology is available.
3. Don't hold back on homework.
4. Become an expert in time management.
5. Prepare for an extended absence from home.
6. Think internationally.
7. Expect technology quirks.
8. Recognize in class that you are indeed overseas.
9. Plan your travel carefully.
10. Don't forget your spouse's needs (Ulrich, 2005).

Although this topic area has some contemporary data as noted above, there is still a gap between what is known and what is not known about cross-cultural preparation, adaptation to host environments, and what defines a positive or failed expatriate academic experience. The data available tends to be concentrated on the experiences of faculty from Australia and the United Kingdom. To the extent known, similar studies have not been conducted among expatriate academics from the United States. While at the same time, there is an extensive database on international and expatriate experiences of those in business across the globe.

In another case, although not directly related to expatriate academics, but has generic content that addresses expatriation, Shim (2001), used a two phased research design of expatriates including a review of literature and interviews of 'sojourners' who had spent time in others countries (Shim 2001). The first phase was an interview process of screening questions based on Dr. Shim's review of literature. The second was the actual development of a six section

quantitative questionnaire with two open ended questions (Shim & Paprock, 2002). To reduce random error, Dr. Shim sent surveys to all 110 potential respondents with a 63% response rate.

The instrument was designed to assess how, or if, expatriates adjusted their behavior in an attempt to learn and adapt to the culture while in a host country. The questions were based on Taylor's learning model of becoming interculturally competent in the host country (Shim, 2001). The ability to adapt or not could then be an indicator of a positive expatriate assignment (Shim, 2001). Dr. Shim published her doctoral research with her Research Advisor, Dr. Kenneth Paprock, from Texas A&M University for the publication *The International Journal of Training and Development*.

Shim was seeking information identifying the learning process of those living in a host culture. The original study by Taylor (1993) found that transformative learning theory, how we learn and act on our own feelings and values, was able to partially explain the difficulties in adapting to host countries. Shim's respondent group had varied backgrounds including former Peace Corps volunteers, business/industry expatriates, and students.

Shim (2001) also used a demographic questionnaire as part of the instrument with the belief that multiple socio-psychological factors can affect a respondent and have an impact on their respective data. These include age, ethnic group, marital status, gender, education level, countries worked in, and professional background.

Shim's (2001) data yielded several results. First was that expatriates do change externally after residing in the host country as they adjust to life's day-to-day activities. This has been found to be fact in other studies (Goldstein & Smith, 1999; Kealey & Protheroe, 1996; Ward & Rana-Deuba, 1999).

Second, expatriates perspectives did have a small change in terms of being more open minded, considerate, and the development of an understanding of the host culture. However, Shim (2001) concluded a complete personal behavioral transformation did not occur and is in contradiction with the Taylor (1993) study in which Taylor indicated a complete transformation did occur for long-term expatriates.

Third, some expatriates based on their demographic category had more adjustment problems than others. Older males and those with no previous cross-cultural experience had the most adjustment problems. However, after spending time in the host country only those with a lack of previous cross-cultural experience seemed to continue to have adjustment problems (Shim, 2001).

Fourth, Shim found there was a strong relationship between initial expectations of the host culture and their ability to adapt and adjust to the host culture. Dr. Shim noted if expatriates had a high level of difficulty adjusting to their new culture upon arrival, they would continue to have problems adapting. These findings have also been noted in other studies (Searle & Ward, 1990; Ward & Rana-Deuba, 1999; Ward & Kennedy, 1996).

Fifth, since this study was focused on what expatriates learned about their own adjustment abilities when adapting to a host culture, Shim (2001) concluded that expatriates gained insight about their new host culture via reflective learning. Shim (2001) found that for those expatriates who were able to adapt to the host culture were able to question and examine their previous assumptions and behaviors they brought with them from their home country.

Finally, various learning situations were found to help the expatriates adjust to their host culture. These included interactions with others in their professional environment, social interaction with host country nationals, and cross-cultural and language training prior to their

departure. Shim found that cross-cultural and language training had a significant impact on expatriate's willingness to adapt to their host culture (Shim, 2001). Shim also noted many groups had been excluded from her research including academics, military personal, diplomats and other non-government organizations such as missionaries (Shim, 2001).

Summary

What is known at this point about the status of academic expatriation is very little. Those who have researched academics as expatriates have used pejoratively small respondent groups to support their findings. This includes a total of approximately 20 expatriated academics that traveled to only five different countries from two different studies. The available scholarly literature including dissertations and academic journals provide very little information regarding the status of selection, cultural adaptation, socialization, training of expatriate academics and whether or not expatriate faculty have had a successful experience within their host cultures.

What is also known is there are no specific quantitative instruments designed specifically to measure academic expatriation, to identify what characteristics or circumstances may lead an academic expatriate to take on an expatriate assignment, if and what kind of cross cultural training they may have had, whether or not their career may be advanced as a result of expatriation, and what would lead the expatriate to think they had a successful or abortive experience in a host culture.

On the other hand, expatriates from business have been extensively studied from multiple research perspectives including selection procedures, cross cultural training and training evaluation, location of expatriation and factors leading to a perceived successful or failed expatriate experience. For those in business and industry the number one reason for expatriate failure is the inability of the expatriate and/or his or her family to adjust to the new culture.

During the selection process, there are several personal characteristics that can be indicators of future expatriate success or failure including personality characteristics, socio-cultural readiness of the expatriate and/or their respective family, and the proper selection and training of expatriates. For those in business, there are several evaluation instruments to use for the selection of expatriates to determine potential to adapt to a host culture and to use as a training design tool. While instruments such as the Cross Cultural Adaptation Inventory are acceptable for business, there is no specific evidence the same conclusion can be made for academics. Additional research beyond the scope of this research may yield data supporting or rejecting the use of such pre-departure selection tools for academic expatriates.

The proposed study has been developed to identify the current status of academic expatriation practices and what aspects may lead to a positive expatriate academic experience within a host culture. In addition, information collected from the respondents' university Provost and/or International Education Director to determine what if any impact an expatriate experience may have on the career of the academic. Respondents are also asked if they believe an expatriate academic experience will enhance their career progression. The majority of available subject matter literature addressing expatriate academics is concentrated on research in Canada and of Australian and British academics on expatriate assignments.

The respondents for this proposed research are from two United States Midwestern comprehensive universities and have experience as an expatriate academic within the past five years. The population selected is the largest group known to date addressing expatriate academic experiences and uses a quantitative approach to data analysis.

The lack of substantial data addressing this subject indicates that more information is needed to contribute to the current knowledge of expatriate academic adjustment to host cultures and what constitutes a positive expatriate academic experience.

CHAPTER 3

METHODOLOGY

This research is comprised of a current status study to provide data on the expatriation process for academics. Data for this study comes from questionnaires, interviews and reviewing available materials of the expatriation process. Data from respondent interviews have been incorporated into the larger respondent group who were sent surveys as the data did not have statistically significant outliers in comparison to the larger group.

This research contributes to identification factors leading to a successful academic expatriate experience within a host country culture. Further, recommendations for pre-departure cross-cultural training are incorporated into the recommendations after data analysis as well as recommendations for additional research of academic expatriates. This current status study used a survey method of returned expatriate academics along with interviews of administrators and a randomly selected sample of the identified respondents.

The instrument contained questions that have clearly defined alternative responses for respondents to select from. Qualitative comments have been reviewed and themes have been identified. Of note regarding qualitative comments, there was very limited qualitative commentary, which did not allow for a statistical coding process. By using descriptive statistics and statistical tests on the closed-ended questions for the methodology of this research,

additional strength is given to the conclusions and recommendations to help determine what factors may lead to a positive academic expatriate experience in adapting to a host culture.

As a result of conducting sample and administrator interviews and the resulting data analysis, a current status study has been developed based on data from the sample institutions and comparisons have been made as a result to identify commonalities and differences between academic expatriates and those from industry.

Data Collection Software

A survey according to Fink (1995) “Is a system of collecting information to describe, compare, or explain knowledge, attitudes, and practices of behavior” (p.1). Fink (1995) continues by addressing whether survey questions should be open-ended or closed-ended. She writes that both have advantages and disadvantages. Requiring a respondent to use their own words indicates an open ended question and gives the respondent the ability to use reflective thought. The drawback is the data collected may be more difficult to interpret (Fink, 1995). In order to reduce to the extent possible this potential drawback, this research uses an instrument primarily with closed ended questions. However, there is an opportunity for respondents to include additional comments for review, which may add to validation of the conclusions.

The advantage of closed-ended questions gives respondents the opportunity to not express themselves while being questioned (Fink, p. 33). Another advantage is that closed-ended questions may provide for standardized data that can have statistical tests and techniques more readily applied. Fink (1995) notes that the disadvantage with closed-ended questions is that answers must be known in advance. To take full advantage of appropriate research techniques, this research used software program specifically designed for survey research called Qualtrics. The Qualtrics program can incorporate open and closed-ended questions, rating scales, and

multiple choice questions. Validation can be supported by requiring a minimum number of responses and the program can be configured for statistical tests, descriptive, and inferential statistical procedures. (www.qualtrics.com, 2009).

Population and Sample

The respondents for this status study are 65 former academic expatriates from a sample of two Midwestern comprehensive public universities in the State of Wisconsin; the University of Wisconsin-Eau Claire and the University of Wisconsin-Stout. Both institutions are AACSB accredited, which enhances the ability to replicate the research at similar institutions.

Respondents are from the population of current or visiting male and female faculty members who have repatriated from an academic expatriation experience. The data analysis and review includes pseudonyms or titles as appropriate to protect the anonymity of the respondents.

Respondents must fit the criteria of an expatriate academic who has returned from an expatriate experience within the previous five years.

Respondents were identified through the academic departments in which they serve as faculty members at their respective university. In order to determine the potential population size for this research, the researcher contacted all academic department chairs at both universities to get a list of names for the respondent list. There were 65 potential respondents in the population.

The universities were selected because both have programs where current faculty members have taught in foreign countries for short-term and long-term expatriate assignments. This respondent group is numerically the largest known for the proposed topic research to date. Their respective expatriate academic assignments have lasted up to and occasionally more than one year in duration. Both universities have had faculty members with academic expatriate experience in programs including the Fulbright Scholarship Program, while on an international

sabbatical working as an academic at a foreign institution or other experience as an academic expatriate. In some cases, the respondents may be originally from other countries, but also meet the requirements for a respondent for this research with their home university being one of the two noted institutions.

The two AASCU institutions were also selected because of the proximity and accessibility of the researcher to conduct interviews of the selected sample of academics and administrators for this research. The potential respondent group is inclusive of the population fitting the definition of an expatriate academic as noted for this research at the time the research has been completed.

The former academic expatriate respondents for this survey have taught in a wide selection of host countries including Turkey, Lithuania, Canada, Mexico, Spain, England, France, Scotland, Finland, Norway, Iran, Kazakhstan, India, Chili, The Czech Republic, Germany, The Bahamas, and China. It should be noted that the countries listed above were not asked for when gathering potential respondent names. This information was volunteered by the department chairs when providing faculty names.

Data Collection

This research employs multiple data collection methods. Respondents have been asked to complete a demographic questionnaire as a primer for the main body of the instrument.

Qualtrics is used for the collection of data and specific data analysis techniques can be applied as required. It can be used to calculate descriptive statistics of closed-ended questions and be configured for the application of statistical tests. A coding process was proposed for open-ended comments respondents. However, the open ended comments provided by the

respondents were limited and a qualitative evaluation has been completed of comments provided by respondents. An advantage of using Qualtrics is that a respondent can stop and continue the instrument at a time that is more convenient. Another advantage is the permanence of the data collected for review. It can be downloaded electronically and the researcher can track new data as it becomes available.

All 65 of the potential respondents were sent an invitation to participate. To conduct the academic respondent interviews, the respondents were randomly ordered and separate requests were sent to the members of the randomized list until ten respondents have agreed to an interview. Once the interviews were completed, the sample respondents are asked to offer any additional comments regarding their experiences or the instrument. This included if they felt the questions and alternative selections were accurate in measuring their opinions and what, if any additional information they think could have been included or excluded. The sample respondents universally concluded the instrument was a good measure of their experiences and none of the respondents made suggestions for additions or deletions at the time of the interview.

Upon approval to collect data, the researcher immediately contacted the Chancellor and Provost at both respondent universities, and five randomly selected department chairs and asked for a personal meeting to administer the administrator questionnaire. If personal interviews were not convenient, then the questions were sent via e-mail. This short questionnaire was designed to learn more about career potential for expatriate academics and the general atmosphere regarding levels of support for faculty considering an expatriate experience.

This provided fast access to background information that could yield data on why a faculty member may take on an expatriate assignment as it relates to career development. The administrator data provides a context on what the institution has said, written, and done relative

to internationalization. This information is correlated to Question 5 of the research specifically addressing career development.

Although additional background information addressing career potential for academics was collected from the respective chancellors, provosts, department chairs, and international education directors, the only data for analytical review and recommendation purposes is the data collected from the expatriate academics. As noted earlier, respondents were identified by contacting the academic department chairs at both respondent universities. The chairs were given a list of the qualifying criteria to be a faculty respondent and in turn the chairs provided names of individual faculty members meeting the requirements to be a respondent. They were not asked to contact potential respondents or to give contact information although some chairs did contact members of their department to determine if they wanted their name released to the researcher. It is believed that all potential respondents' names were forwarded to the researcher. A number of the department chairs did provide actual names of countries where faculty members taught.

After the initial interviews were completed and analyzed, an introductory invitation was sent to all potential respondents requesting them to log into Qualtrics to complete the questionnaire. The response rate is noted in Chapter 4.

The interviews took three weeks to complete and for the larger group of respondents, the data collection time frame was approximately five weeks to accommodate schedules. Respondents not replying to the original request were contacted with a follow-up request ten days after the initial request and followed by a five day waiting period for a final request to be sent to non-respondents. These friendly reminders were set up via the Qualtrics program.

Non-response

Although the entire population meeting the definition of a qualified expatriate academic at the two respondent universities was contacted to participate in data collection, there was non-response in regards to the entire instrument or in part by respondents not answering one or more of the instrument questions. Fowler (2002) described three possibilities of non-response. First is the group of potential respondents who do not receive the survey instrument thus eliminating them from the list of respondents without their knowledge of the survey. Care has been taken to ensure no potential respondent fit into this category. Second are those potential respondents who refuse to provide data. Third are those who are asked but for some reason are not able to answer the questions. These respondents would include those who cannot read or have poor writing skills, are too ill to answer the questions, or other issue which precludes them from completing the survey instrument (Fowler, 2002). With the exception of non-response by refusing to provide data, it is expected respondents in the population do not fit the other non-response criteria.

Bias associated with non-response, which is the effect on the data by those not completing the survey or portions of the survey can skew the data and results (Fowler, 2002). Although the respondents have had expatriate academic experiences in several different host cultures; this may be problematic for this research if the response rate is not adequate. All potential respondents were given the option of not completing the survey as required when using human subjects. Forcing a respondent to answer a question they purposefully did not want to answer may increase the chance for skewed or biased data or could force the respondent to decide not to complete the instrument. This is where having the 'other' as a question option may have been beneficial if one of the alternatives did not fit their respective experience. Qualtrics can be configured to allow respondents to move onto the next question if they do not want to

answer the current question. They also have the option of returning to skipped over questions. Non-response has been noted in the findings.

Past research has determined that response rates from mail surveys are more favorable when the respondents are likely to have an interest in the research or the subject matter (Fowler, 2002). The population for this research is inclusive of expatriate faculty members and it is believed this population did have an interest in contributing to this research regardless of data collection technique. It should be noted there was partial non-response, which changes the number of degrees of freedom among the survey questions.

Instrumentation

To date previous instrumentation addressing cross-cultural training and development of expatriate academic experiences does not include any quantitative content and subsequent analysis. The majority of current instrumentation on expatriation in general is focused on those from business. Part I of the instrument for this research contains a set of basic questions used for demographic classification purposes and identifies expatriate experience countries, gender, and age. It has been noted in the findings if these demographic factors correlate with the expatriate experience data collected from respondents. Descriptive statistics have been applied to the demographic questions. Part II of the instrument addresses the overall experiences of the academic expatriates as to how they were selected, trained, traveled to and interacted within a host country culture. Below are the questions for this research of academic expatriation.

Question 1: What are the reasons given by faculty for choosing an international academic experience?

Question 2: What training or other preparation methods did the expatriate academics use to become more acclimated to their host culture?

Question 3: What factors contributed to the faculty member's perception of a positive experience?

Question 4: To what extent are the factors contributing to success of expatriates in business and industry similar to the factors contributed to the faculty member's perception of a positive experience?

Question 5: What are the institutional conditions that support or detract from faculty involvement in expatriate experiences?

Question 6: How is an academic expatriate experience measured as being successful?

Question 7: What is the relationship between age, gender, level of pre-departure training, family issues, institutional and individual career expectations, and the level of success of the expatriate academic?

Large tables and figures are in Appendix A, the survey instrument is in Appendix B, the administrator informal background questions are in Appendix C, information from administrators is used for comparison purposes as a portion of the instrument addresses real or perceived career potential for academics. The introduction letter to respondents is in Appendix D, a copy of the informed consent is in Appendix E.

Variables

A variable is a characteristic of research that can be measurable (Fink, 2005). The interaction of the independent variables determines the impact on the dependent variable or variables. The dependent variable for this research is what determines the level of success for

academic expatriation. Research question numbers three and six are directly related to the perception of a successful academic expatriate experience and question number six within the survey instrument represents the dependent variable, success, for statistical testing.

Independent variables are those variables that correlate with the level of success. The independent variables include those that help to determine the current status of academic expatriation including demographic descriptors such as age, gender, amount of pre-departure training if any, the impact of family issues, adapting to a host culture, and if career expectations had an impact on the expatriate. The choice of statistical measures is dependent on the type or types of data collected. This can be numerical, ordinal, or nominal (Fink, 2005). The specific analysis techniques proposed for this research are addressed later.

Procedures for this Study

The demographic portion of the instrument, which has nominal and ordinal content, has descriptive statistical procedures performed and applied as appropriate. Data includes the various countries respondents have had expatriate academic experience, academic rank, age, and gender. The independent variable of gender provides for the grouping variable of the research.

As noted earlier, chancellors, provosts and department chairs at the respondent universities received a short open ended questionnaire addressing expatriate academics experiences as a component of professional development to identify if there is a perception that an academic expatriate experience leads to career development and promotion. A random sample of department chairs is also included. Since this small group is not part of the official respondent population of this research, this data is for informational purposes regarding the perceived status of expatriation and career development. Responses have been analyzed and included in the

results. Differences and similarities compared to the data collected from the academic expatriates have been noted in the analysis.

Questions 1-21 of Part II of the instrument, which is quantitative in nature, have descriptive statistics and frequency count analysis as appropriate. This information is used to make note of commonalities and differences of the respondent group and a written analysis of each question has been completed. An analysis of any qualitative comments from the respondents in questions that offer the option for 'other' has been incorporated.

Validity

In order to support validity of the instrument several steps have been taken. First, the instrument was designed based data analysis of the literature review. This was to determine specific topic areas to cover within the instrument. The demographic questions of the instrument were developed based on other instruments used to identify grouping variables and basic characteristics of the respondents. Second, prior to pilot testing the instrument, three international education directors were asked to review the document and provide input regarding the reliability of the survey. Third, 10 members of the respondent group were personally interviewed by the researcher. The interview included all of the questions from the survey instrument. After each interview, the respondents were asked their opinions of the instrument and if they would have any additions, deletions or corrections to the questions. Very little feedback was given addressing the instrument. At this point, the instrument was given to the larger group of respondents. Upon comparison of the results from the pilot test and the larger respondent group, the data did not show significant statistical differences. After consultation with the advisor, the data was grouped together for analysis.

Analysis

Prior to determining specific tests to apply to the data, Fink (1995) writes the researcher must use a checklist for selecting the most appropriate data analysis. This includes the number of independent and dependent variables and if the data supports nominal, numerical, or ordinal independent and dependent variables. As noted earlier, descriptive statistics, as appropriate have been applied to all applicable questions with an analysis of the findings.

The purpose for this current status study is to classify the data and make decisions, conclusions and recommendations regarding expatriate academics and any training needs to improve the experiences and chances for a successful outcome of an expatriate academic experience. There are nominal and ordinal data points. Nominal scales are used to address items that have no numerical value, but to support analysis a numerical value can be applied to respondent data (Fink, 1995). For this research items with a nominal scale include gender, and if the academic expatriate developed their own experience, was non-competitively or competitively selected. The nominal scales applied with the greater statistical analysis are addressed later.

Ordinal scales are also used to address question items. Ordinal scales are used to classify data in terms of agreement by the respondent or quality (Fink, 2005). Within the instrument, there are multiple ordinal questions. This includes all Likert type scale questions.

For any written content of substance offered by respondents a review has been completed. The overall amount of written content was limited despite significant opportunity to provide written comments. Further, from the written comments, no specific patterns or significant themes were identified. However, the comments included did offer insight into personal experiences of those who offered written content.

It was determined a coding process for written content would not provide significant additional information to quantify. In one instance (the final question of the instrument), loose themes were identified. However, the themes in each instance did not have more than two respondents with similar comments. A written analysis of the comments is included in Chapter 4, but due to limited content, a codifying process for qualitative comments has not been applied.

The statistical test for this research is the independent sample *t*-test to address if the variables are related. The level of significance is set at 0.05. The statistical test is applied to gender as the grouping variable and to all ordinal Likert type scale questions. The amount of correlation is addressed in the analysis of the data. The uses of Levene's test for equality of variances and *t*-test for equality of means are used in the independent samples *t*-test. It is important to note the correlations tests are to estimate relationships and not to attribute direct cause and effect (Fink, 2005). It is important to note in the *t*-test it is assumed the samples are reasonably normally distributed. All of the data collected has appropriate descriptive statistics and graphics as needed. Finally, the analysis includes a comparison of the results from this research to the data noted for those in business. Similarities and differences have been noted and topics for additional research are included in the recommendations. Appropriate tables and figures are included and analysis completed.

Summary

The respondent group for the research is the population of former expatriate academics whose expatriate academic experience is within the previous five years. Respondents are former expatriate academics from two United States Midwestern comprehensive universities. Both of which are AACSB accredited. The use of proper sampling in research is used to "obtain valid knowledge about some aspect of education and to apply that knowledge to a defined population"

(Borg & Gall, 1983). Using the population will eliminate to the extent possible chances for sampling error. Because the current literature indicates that for those in business and industry and to a lesser extent for those in government and academia, there may be the belief that an academic expatriate assignment may lead to career advancement. Chancellors, provosts, department chairs and the international education directors at the respective respondent universities are informally asked if an expatriate academic assignment can have a positive impact on the career of the expatriate academic. To support validity, the instrument was reviewed by content experts on expatriate experiences and pilot testes by a randomly selected portion of the larger respondent group.

Invitations were sent via e-mail to all potential respondents requesting them to login to an online survey program called Qualtrics. The invitation to participate contained information about the proposed research, the instrument format, and questionnaire related information. Friendly follow-up reminders were sent to non-respondents. Following data collection the analysis addressing the purpose and questions of this research has been conducted.

The analysis addresses the questions of this research, determines the current status of academic expatriation and what factors may lead to a successful cross-cultural experience for expatriate academics. Descriptive statistics and independent sample *t*-tests are performed on the data. Gender is used as the grouping variable for the *t*-test. From this data, conclusions have been made and recommendations for training are offered. Because this is a fairly understudied respondent group; additional research opportunities are presented.

CHAPTER 4

RESULTS

The purpose of this status study was to contribute to the body of knowledge regarding the status of academic expatriation cross-cultural adaptation practices, identify similarities or differences between those in business and academia, to determine if there are career expectations for academic expatriation, and to offer recommendations for selection and cross cultural training of expatriate academics.

Two AASCU universities were selected as a sample from which to identify recent expatriate academics for this study. Sixty five faculty members were identified and invited to complete the survey. It should be noted that four of the potential respondents could not be contacted. On follow-up with the sample universities, two respondents were on sabbatical and two had recently left their respective university. A total of 34 of 65 academic expatriates responded to the invitation and follow-up requests. This represents a 53% response rate. Eleven of the respondents were female, while 23 were male. However, not all 34 completed all questions within the instrument. Seven respondents partially completed the instrument, but did not finish.

The survey program Qualtrics was used as a method of data collection for the main body of respondents. Three international education directors reviewed the instrument prior to distribution. They were asked if the instrument addressed topics appropriate for an expatriate academic instrument. The international education directors indicated the instrument appeared

appropriate and because this was the first known quantitative survey instrument of expatriate academics, the consensus was the instrument would provide for a foundation of relevant data and to learn more about expatriate academic cultural adaptation experiences and related selection and cultural adaptation training. One international education director was hopeful an appropriate expatriate selection instrument based on cross cultural adaptability of academics could be developed at some point in the future.

Finally, a total of seven administrators addressed questions of university and career expectations regarding expatriate faculty experiences. There were four specific questions asked of the administrators (see Appendix C). This includes two university chancellors, one provost and four department chairs who responded to requests to participate. This provided for a 50% response rate from administrators who were contacted for interviews. The number of responses to specific questions varied slightly as noted in the findings.

Descriptive Statistics of Survey Questions

There were a total of 25 survey questions. The first three are demographic questions and the balance of the questions addressed specific academic expatriate experiences. The majority of questions have frequency counts. However, survey questions 6-8, 13-14, and 16-19 (see appendix B) include mean and standard deviation as noted from the statistical analysis.

Demographic Data

Thirty-four respondents completed the instrument or portions of the instrument and the male to female ratio was approximately 3:1 (see Table 1). By reviewing the names of all potential respondents, those completing the instrument closely mirrored the presumed gender from the larger group. It is not known if this is common across all AASCU institutions. Table 1 also incorporates demographic data on faculty rank and specified age at the time of expatriation.

Noted in Table 1, very few academic expatriates are from non-tenured or non-tenure track positions. This may be due to preference being given to tenured faculty, non-tenured or non-tenure track academics may be focused on establishing themselves at their respective universities or other reasons. The majority of respondents, 61.8% have a rank of full or associate professor. Although the total of assistant professors, 26.5% was equal to the number of associate professor respondents, the single largest group was full professors at 35.3% of respondents.

The age of respondents (see Table 1) was varied with 51.5% of those responding were 45 years old or younger. The largest single age range with 13 of the respondents was 46-55 years old with a total of 39.4% of respondents. Because age ranges were used, it is difficult to identify a median or mean in terms of respondent age.

Table 1

Gender/Rank/Age

Demographics	Frequency	Percent
Gender*		
Male	23	66.7%
Female	11	32.4%
Total	34	99.1%
Academic Rank**		
Assistant Professor	9	26.5%
Associate Professor	9	26.5%
Full Professor	12	35.3%
Visiting Professor	0	0.0%
Instructor	2	5.9%
Visiting Lecturer	2	5.9%
Total	34	100.1%
Age***		
26-35 years old	6	18.2%
36-45 years old	11	33.3%
46-55 years old	13	39.4%
56 years or older	2	9.1%
Total	32	100%

Note: *Having a minimum of 10 females in the respondent group is critical to using the independent variable *t*-test with gender as a nominal independent variable. Percent is commonly used for reporting demographic information and it is possible the total will not equal 100% because some respondents may not indicate an answer. Demographic survey question one: Gender. **Demographic survey question two: What was your academic rank when you participated in the expatriate academic experience? *** Two respondents did not answer this question. Demographic survey question three: What was your age group at the time of expatriate academic experience?

Respondents had their expatriate experience across the globe. A significant number spent their respective time in Europe. However, many of the respondents were in other global regions.

In Table 2 the reader will note several of the respondents were in Scotland. Presumably this is because of the Wisconsin in Scotland program noted earlier. While this program also serves students from the United States, there is considerable opportunity for interaction with the people and cultural differences of Scotland compared to the United States. The Wisconsin in Scotland program also requires students to take two classes taught by professors from a local Scottish university. Historically, some of the Wisconsin in Scotland faculty have developed a team teaching approach with the Scottish faculty. However, both sample universities have multiple exchange programs with universities throughout the United Kingdom.

Additionally, while Scotland is part of the United Kingdom, two of the respondents indicating their experience was in the United Kingdom, there is no evidence their respective expatriate experience was specifically in Scotland, Wales, England, or Northern Ireland.

One item of note is five of the respondents reported having their expatriate experience in the United States. This means they were foreign nationals at the time. The researcher discussed this topic with the respective respondents. Each had traveled to the United States from another country to teach or to go to graduate school and work as a teaching assistant or adjunct instructor. After their expatriate experience in the United States, they purposely sought out permanent faculty employment in the United States. The researcher is aware of one respondent who traveled back to their home country to teach for several years and ultimately came back to the United States to work in academia full time as a professor. These experiences make the five noted respondents eligible to participate in the research.

Table 2

Country of Expatriation

Country	Frequency	Percent
Australia	1	2.9%
China	1	2.9%
Finland	1	2.9%
Guatemala	1	2.9%
Kazakhstan	1	2.9%
Lithuania	1	2.9%
Norway	1	2.9%
Scotland	9	26.5%
France/Ireland	1	2.9%
Taiwan	1	2.9%
Thailand	1	2.9%
Turkey	2	5.9%
United Kingdom	2	5.9%
Ukraine	1	2.9%
United States	5	14.5%
No Response	3	8.8%
*Total	32	<100%

Note. Survey question one: Please list the country of your most recent expatriate academic experience. *Two respondents did not include their country of expatriation.

Survey Results by Research Question

To be clear to the reader, results are addressed by research question and survey questions related to the research question.

Why Academics Expatriate

There are several reasons why an academic would desire to take on an expatriate assignment as well as a specific country or international institution and their respective willingness to apply via a competitive process or not. Survey questions two, three, and four, specifically addressed this question (see Appendix B).

Seventeen of the respondents went through a competitive process for acceptance of an expatriate experience and 13 reported a non-competitive or self-selection experience (see Table 3). There are different requirements for some of the more competitive programs. For example, the Fulbright program requires the applicant to be a tenured professor at their respective home university. They also need to submit a detailed plan for their respective expatriate application. One of the respondents reported submitting their Fulbright application with three separate proposals for country and foreign education institutional (IIE, 2010).

Another program for this research required the instructors to submit five separate courses they could teach (WIS, 2010). Consequently, the majority of respondents went through some form of competitive process to be selected for their respective expatriate assignment. Four of the respondents did not address this question and it is not known if they applied via a competitive or non-competitive process for their expatriate assignment.

Table 3

Arranging Expatriate Assignment

Response	Frequency	Percent
I created my own expatriate opportunity	10	29.4%
Internal (Home Institution) non-competitive selection process	1	2.9%
Internal (Home Institution) Competitive selection process	9	26.5%
External Non-competitive selection process.	2	5.9%
External Competitive selection process (e.g., Fulbright)	8	23.5%
Missing	4	11.8%
Total	34	100%

Note. Survey question two: How did you arrange for this experience (i.e. did you apply for a particular opportunity)?

There was a spread of responses regarding why someone wanted to take on an expatriate experience as noted in Table 4. There were eight comments in the other category. However, no common theme was identifiable. Rather, the respondents offered a variety of answers including having a belief that the global experience is essential to prepare for a global society, previous experience as a student and researcher abroad provided the momentum, the respondent was invited, the respondent wanted to live abroad, it was an opportunity to do something new, and it would be a valuable experience for the expatriate and their family. Of the pre-determined options, the most common response at 38.2% was that the respondent felt it would be good for their career in terms of promotion and tenure.

Table 4

Reasons for Accepting Expatriate Assignment

Response	Frequency	Percent
In general, faculty are encouraged by my institution to have international experiences.	8	23.5%
I was personally encouraged to do so by my employer.	4	11.8%
In general, our students are encouraged to have international experiences and I wanted to be supportive.	7	20.6%
The opportunity just came up.	7	20.6%
I thought it would be good for my career.	13	38.2%
Other	8	25.3%

Note. Survey question three: Why did you decide to participate in an expatriate academic opportunity? Select all that apply and if ‘other’ please explain. Check all that apply.

Interestingly, the majority, 61.8% of respondents reported that the location of the experience was of secondary importance. This may indicate the interest in the experience more so than the specific location. In this question, the seven missing data points may offer evidence to the contrary. However, it is not known if those who indicated ‘no’ as their respective response to the question would have been a ‘deal breaker’ if they were not accepted for a specific assignment (see Table 5).

Table 5

Multiple Country Willingness

Response	Frequency	Percent
Yes	21	61.8%
No	6	17.6%
Missing	7	20.6%
Total	34	100%

Note. Survey question four: Were you open to multiple countries?

To summarize research question one, approximately 50% of respondents went through a competitive selection process and the remaining 50% were selected via a non-competitive process. In terms of why an academic would take on an expatriate experience, the reasoning was across all categories with the largest response the belief it would be good for the academic's career. Finally, respondents were generally willing to consider multiple countries

Institutional Support for Expatriation

Traditionally a member faculty has three major professional expectations; research, teaching, and service to the university community. These roles are included in survey question five (see Appendix B) to give the researcher an idea of what the faculty expatriates were expected to do, either from their own volition, or as part of an expected requirement while on their respective expatriate assignment. This topic is addressed again later in the data analysis when reviewing the responses from administrators. In business, the expatriate process and expenses are normally bore by the business. However, in academia, while there is support for academic expatriation, financial support is limited.

The results indicated expatriate faculty members are expected to perform many of the same responsibilities as home country faculty (see Table 6). The majority of respondents

reported teaching and conducting research were either part of or their sole respective professional duties while on their expatriate assignment. Of note is that 35.3% of respondents indicated personal professional development as part of or their sole professional duties while on assignment in their respective host countries across the globe.

Table 6

Professional Duties

Response	Frequency	Percent
Teaching	21	67%
Administration	5	14.7%
Non-academic Professional position	1	2.9%
Conducted research	15	44.1%
A Student	1	2.9%
Personal professional development	12	35.3%

Note. Some respondents had multiple professional or personal duties. Survey question five: What did you do during this expatriate experience? Check all that apply.

Survey question 19 asked if the expatriate kept in touch with their home institution and family staying behind while they were on assignment. A significantly high number, 73.5% agreed or strongly agreed in terms of keeping in touch with family. One of the key success factors for those in business is to have a method to keep in regular contact with the home office. Notably this is done to keep their names in the corporate loop. When expatriate academics were asked a similar question regarding keeping in touch with the home institution via e-mail, the total was 50% and it was considerably lower at 20.6% for keeping in touch with the home institution using a telephone including a landline or mobile telephone.

Academics also reported a desire to keep up with host country news events. When paying attention to home country news, 67.6% agreed or strongly agreed they were current with home country happenings while on their expatriate assignment. Overall, just two of the respondents did not pay attention to the home country news. Finally, when asked how in touch expatriates were in terms of events in the host country such as news, cultural events and so on, 44.2% agreed or strongly agreed. While 32.3% either strongly disagreed or neither agreed nor disagreed. Overall the results indicate respondents kept in touch with family, and were interested in the news of the host country, while having a lower level of interest in home country news or keeping in close contact with the home country institution. Table 7 includes the mean and standard deviation for the five sub-questions of survey question 19.

Table 7

Relationship with Home Country While on Expatriate Assignment

Sub-Question	\bar{x}	σ
Kept in touch with family	4.26	0.712
Paid attention to home country news	4.07	0.829
Kept in touch with home institution via telephone	2.41	1.526
Kept in touch with home institution via e-mail/Internet	3.78	1.368
Mostly concerned with events in the host culture	3.65	0.892

Note. Survey question 19: The following statements relate to your relationship with your home country while on assignment. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).

The Levene's test of significance for all of the sub-questions to survey question 19 was larger than the alpha of 0.05 and statistical difference cannot be assumed in the means of the respondent group. The majority of respondents kept in touch with family and friends as well as

the home institution. The primary contact method was e-mail for both males and females. Interestingly the lowest significance level of 0.331 was the response regarding being concerned with local host country happenings. There was a considerably stronger relationship to keeping up with home country news while away with a significance of .553. The degrees of freedom varied on survey question 19 from 13 to 25. It is not known why some respondents decided not to address all of the parts to question 19. See Table 25 in Appendix A for complete results.

The literature review made note of the fact that those in business are often selected for an expatriate assignment based on career growth potential. This research incorporates a summary of interviews between the researcher and various administrators. A total of eight interviews were completed. The goal of the 15 minute interviews was to determine institutional conditions supporting faculty in identifying an expatriate position as well as the potential impact on the career of the faculty member and financial support.

Those interviewed included two university chancellors, one provost, and five department chairs. While this qualitative approach is not a formal part of the research and data analysis, it can help to identify more in terms of institutional conditions supporting faculty expatriation and career development as well as support conclusions and recommendations.

Both institutions have an International Education Office which works to help faculty identify expatriate academic activities. The time frame for an expatriate experience can range from several weeks to one year in length. Faculty are also encouraged to consider outside opportunities such as the Fulbright Professorship program. Finally, it was noted that in some cases, the faculty who take on an expatriate experience plan for a teaching sabbatical in a host country as part of their sabbatical.

Administrators generally noted there is some funding available at the department, college, and university level. However, rarely is there full funding for an expatriate experience. All respondents noted faculty are encouraged to identify sources within their respective International Education Office which provides information on outside sources of funding. Occasionally, the faculty member can get funding for a self-designed study abroad program if enough home country students sign up for the respective study abroad experience.

One department chair specifically noted the Centers for International Business Education and Research (CIBER) offer partial or full funding for faculty experiences. However, the CIBER programs are often for short-term faculty trips abroad to learn about international business practices and bring these experiences back to their home country classrooms. Finally, one administrator noted faculty have received federal grants to attend expatriate academic experience. No specific programs were noted, but these grant programs are often competitive.

Senior administrators noted that if the faculty member was able to conduct research as part of their experience as well as teach and then make use of the research in their classroom and/or in academic journal publications, this might bode well for the chances of promotion and tenure. Receiving grants may also play a similar role. However, it was also noted that each department ultimately has a faculty evaluation plan and the process for recognizing academic expatriate experiences begins at this level.

Department chairs provided similar responses and recognized the opportunity to bring the international experience back to their respective home university classrooms. The general consensus was that an expatriate experience would not hurt the chances for promotion and tenure. However, one department chair, who is also a former Fulbright Professor, indicated an

expatriate assignment may be difficult to tie to promotion because of different responsibilities in a host country institution compared to the home country institution.

With one exception addressed later, all administrators made it clear there can be an implicit and explicit connection between an expatriate experience and the career path of the faculty member. Much of the focus was on the opportunity to bring experiences back to the home institution classroom and offer chances for publication. Senior administrators made the connection to long-term career development and the opportunity to develop relationships to foreign institutions as well as placing the faculty member in a better position for future grants related to globalization and overseas opportunities. Another senior administrator noted that international experience is becoming a must for those who want to take on senior posts at universities. Although this administrator did not say exactly what positions they were talking about, the implication was for those who aspire to being a dean, provost, or university president/chancellor.

Another senior administrator as well as one department chair noted expatriate experiences can be a bonus when it comes time for program review, accreditation review, and when making comparisons to similar institutions. Finally, one administrator indicated on the implicit side that taking on an expatriate position might be a form of running away from a difficult home country institution workload. The administrator offered no explanatory comments beyond this in their statements.

Overall, in this short interview of administrators, it can be surmised an international experience may be beneficial to home country faculty. Certainly it can be noted the experience, if completed and objectives met, would not hurt the career of a faculty member.

To summarize there is considerable evidence to conclude institutions support faculty exploring an expatriate assignment. Senior administrators made note of the Office of International Education as a good starting and supporting point for faculty. Administrators also noted that an international assignment may bode well for the career path of the expatriate. Although there is some internal funding, quite often the faculty member needs to identify alternative sources of funding for their expatriate experience. The respondents noted they generally did not have significant contact with their respective home institution, but did have significant contact with non-accompanying family. E-mail was a more popular method for keeping in contact over the use of a telephone.

Perceptions and Definitions of Successful Expatriation

The survey instrument incorporates questions where more than one research question is addressed. In this case research questions addressing the perception of what factors lead to a positive expatriate experience for the academic as well as how can an expatriate experience be determined to be successful are addressed. The subsequent results are reported as noted. There were multiple survey instrument questions associated with research questions three and six. These include survey questions 6, 7, 9, 10, 12, 13, 14, 15, 16, 17 and 18 (see Appendix B). All of these questions include topics and alternative responses which historically have been tied to the topic of expatriate success.

Survey question six gave the respondents an opportunity to 'self-evaluate' their perceptions of whether or not they had a successful experience and the ability to meet the challenges of an expatriate assignment on a professional level. There were nine parts to question six and respondents had the opportunity to select from a five point Likert type scale ranging from strongly disagree to strongly agree (Scale 1 = strongly disagree (or not at all) to 5 = strongly

agree or perfectly). Seventy six point five percent of respondents agreed or strongly agreed they completed their assigned objectives. Only one respondent strongly disagreed to completing objectives. In terms of experiencing cultural adjustment problems, 70.6% of respondents disagreed or strongly disagreed they experienced problems. The third part to question six asked if respondents spent their allotted amount of time while on their experience. Again, 70.6% of respondents indicated this was true. The majority of respondents, 64.8% thought they were prepared for the assignment, while 8.8% of respondents agreed or strongly agreed they were unprepared for the assignment.

In addressing if there was a perception that colleagues were satisfied with the expatriate work performance, 64.7% agreed or strongly agreed. Asked if the experience was personally beneficial, 76.5% of respondents agreed or strongly agreed while only one respondent strongly disagreed. In terms of professional benefits, the numbers were nearly opposite of personal benefits. A total of 67.7% disagreed or strongly disagreed the expatriate experience offered them professional benefits such as improved opportunities for promotion and tenure. However, in a similar sub-question which addressed the possibility of the experience providing for other professional opportunities, the responses were more positive in nature with 50% indicating agree or strongly agree. Finally when asked if the experience was difficult and unpleasant, 76.4% disagreed or strongly disagreed. Only one respondent strongly agreed the experience was difficult and unpleasant. Generally, this would indicate that the vast majority perceived that they had a successful and positive experience as an expatriate.

As noted, this question included a five-point Likert type scale. The analysis of each of the sub-questions in survey question six included the mean and standard deviation as noted in Table 8. The reader will note the means trend toward the positive aspects of the respective question and

none of the standard deviations were larger than 1.207 indicating a generally positive self-perception of the expatriate experience.

Table 8

Self-perceptions of Most Recent Expatriate Experience

Sub-Question	\bar{x}	σ
Completed objectives	4.48	0.849
Experienced cultural adjustment problems	1.63	0.926
Met time in country requirement*	4.49	0.926
I was unprepared	1.93	1.072
Colleagues were satisfied	4.42	0.758
Experience was personally beneficial	4.67	0.832
Experience offered professional benefits	1.93	1.207
Provided for other professional opportunities	3.74	1.163
Experience was difficult and unpleasant	1.26	0.813

Note: Survey question six: Please rate the following statements regarding your perceptions of your most recent expatriate experience by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). *The responses were translated to the following scale to more accurately measure the amount of time in country. The following scale incorporates the converted translation (1 = left almost immediately; 5 = stayed full time)

As noted previously, survey question number six provides for the dependent variable of this research. By conducting independent sample *t*-tests on survey question six, this requires the researcher to differentiate between two groups. Independent sample *t*-tests are used in this analysis to test the means of men and women faculty expatriates and to identify if there is a significant statistical difference between the two groups.

Levene's test for equality of variances in question six was larger than the alpha of 0.05 for six of the nine parts to question six. Each question had 25 degrees of freedom (df) in all

responses except for the sub-question addressing international colleagues satisfaction with the work of the expatriate which had 24 df. The result is the mean differences are not significant for these six parts and equal variances can be assumed between men and women.

However, for three parts of question six, Levene's test did show significant differences between males and females and equal variances cannot be assumed. Levene's test noted the following Sig. values for the three sub-questions of 0.008 ($t=1.188$), 0.015 ($t=-1.344$) and 0.004 ($t=-1.033$) respectively. The mean differences are .592, -.816 and .520 respectively. In all three cases, the t statistic falls within the upper and lower level of confidence meaning that significant differences cannot be assumed. See cut out of Table 9. Of interest is the fact that men were slightly more likely to believe the expatriate experience provided adequate professional benefits compared to women. No additional reasons were given for this fact. See the partial Table 9 and the complete Table 9 is reproduced in Appendix A.

Table 9 (Partial; see complete table in Appendix A.)

Independent Sample t -test Survey Question Six

Please rate the following statements regarding your perceptions of your most recent expatriate experience by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).		Levene's Test for Equality of Variances		t -test for Equality of Means					
		F	Sig.	t	Sig. 2-tailed	Mean Difference	Std. Error Difference	95% Confidence	
								Lower	Upper
I felt the experience was beneficial to me as a person.	EVA	8.296	.008	1.755	.092	.592	.337	-.103	1.287
	EVNA			1.188	.271	.592	.498	-.573	1.757
I felt the experience did not provide me with adequate professional benefits.	EVA	6.760	.015	-1.657	.110	-.816	.492	-1.830	.198
	EVNA			-1.344	.211	-.816	.607	-2.186	.555
Overall, the experience was difficult and unpleasant.	EVA	9.924	.004	-1.558	.132	-.520	.334	-1.207	.167
	EVNA			-1.033	.334	-.520	.503	-1.699	.660

Note. EVA = Equal Variances Assumed. EVNA = Equal Variances Not Assumed.

Survey question seven asked respondents to rate their perception of how different the host country culture was compared to their home country culture in a Likert type scale format. This question also represents one of the independent variables of the research and *t*-test results are noted later in the analysis. There are seven subparts to survey question seven where respondents addressed more of the basic cultural issues they faced while on their expatriate assignment. As noted earlier, the ability to adapt to a host country culture is a critical step to success for those in business. This may be true for academics, too.

When asked about living conditions, 67.7% of respondents indicated the conditions were somewhat different, noticeably different, or very different. Only four respondents reported living conditions were about the same as the home culture. Respondents were also asked about shopping in the sense of meeting daily living needs. With respondents having their experience in at least 15 different countries, the shopping experience was split across the categories with 35.3% indicating noticeable different or very different shopping conditions and 44.1% reporting somewhat different or about the same shopping conditions. What people consume across the globe can be heavily influenced by culture. When respondents were asked about food and drink differences, 47% indicated somewhat different or about the same as the home culture, and 35.3% indicated noticeably or very different experiences with food and drink. Communication, in terms of written and verbal language is often a cultural barrier for expatriates. Respondents were evenly split with 38.2% indicating communication was somewhat different or about the same in the host culture compared to their home culture and 41.2% reported communication was noticeably or very different. Many expatriates rely on public or other non-traditional forms of transportation in a host country, although some may have a vehicle to drive. When asked about

transportation differences between home and host countries, 35.3% of respondents indicated it was about the same or somewhat different while 44.1% of respondents indicating noticeably or very different transportation systems in the host culture.

Respondents were also asked as part of home and host cultural differences about available information technology. This would include access to computers, the Internet, e-mail and the like. Only 11.7% of respondents indicated there available information technology was noticeably or very different. On the other side, the response of not different at all, 14.7%, was finally selected by respondents. A total of 52.9% selected about the same or somewhat different. The daily routine addressed the common activities of daily life. In term of somewhat different or about the same, 50% of respondents indicated little difference between the host and home cultures while 29.4% indicated noticeably or very different cultural aspects of the daily routine.

The means of the sub-questions of survey question seven (see Table 10) addressing cultural differences were more mid-range compared to the success factors of survey question six indicating that living conditions were adequate, but at the same time living conditions were not the same as the home country and not completely different from the home country at the same time. The standard deviations were very small with a range of 0.971 to 1.215 indicating little deviation from the mean for each sub-question.

Table 10
Perceptions of Home and Host Cultural Differences

Sub-Question	\bar{x}	σ
Living conditions	4.48	0.849
Shopping	1.63	0.926
Food and drink	4.49	0.926
Communication	1.93	1.072
Transportation in host country	4.42	0.758
Available information technology	4.67	0.832
Daily routine	1.26	0.813

Note. Survey question seven: Please rate the following items regarding your perceptions of how different the host culture was in comparison to your home country culture (scale 1 = not different at all; 5 = very different).

The independent variable noted for survey question seven considers the respondents' perceptions of living in the host culture as compared to their home culture. This is an independent variable of the research with seven sub-questions with Likert type scale responses.

Levene's test indicated no significant differences in the variances six of seven sub-questions with respective *t*-test results. Thus significant differences in the means cannot be assumed. However, for the sub-question addressing home and host culture communication systems, the significance value was .040, which is lower than the alpha. The equal variances not assumed between men and women respondents *t* value is -.609 and does fall within the upper and lower levels of confidence and significant differences in the means cannot be assumed. See partial cut out of Table 11 and the complete Table 11 is reproduced in Appendix A.

Table 11 (Partial; see complete Table 11 in Appendix A.)

Independent Sample *t*-test Survey Question Seven

Please rate the following items regarding your perceptions of how different the host culture was in comparison to your home country culture (scale 1 = not different at all; 5 = very different).		Levene's Test for Equality of Variances		<i>t</i> -test for Equality of Means					
		F	Sig.	<i>t</i>	Sig. 2-tailed	Mean Difference	Std. Error Difference	95% Confidence	
								Lower	Upper
Communication	EVA	4.707	.040	-.499	.622	-.224	.448	-1.146	.699
System (IT)	EVNA			-.609	.549	-.224	.367	-.986	.539

Note. EVA = Equal Variances Assumed. EVNA = Equal Variances Not Assumed.

Written and verbal language was not significantly different for the majority of respondents with 55.9% indicating no difference, somewhat different or about the same. While 23.5% of respondents indicated written and verbal language was noticeably or very different. In some instances, transportation to and from the host country institution can be a factor. Noted earlier a Fulbright professor had a car and driver to get to the host country institution. There were 38.2% of respondents reporting no difference, somewhat different or about the same and 41.1% reported noticeably or very different. As noted in survey question five, 44.1% of respondents accepted their expatriate assignment in whole or in part because of the opportunity to conduct research. In assessing the instructional and institutional research facilities, 32.4% noted the research facilities were not different, somewhat different or about the same and 47.1% noted they were noticeably or very different compared to the home country institution. Finally, respondents reported on the host country institutional communication system as compared to the home institution. The majority of respondents, 52.9%, reported little or no difference and 26.5% reported noticeably or very different communication systems.

The mean response for each of the four sub-questions was close to the mid-point and the standard deviation was close to the mid-point similar to the means and standard deviation for

survey question seven (see Table 12). The comparison between home and host country institutions indicated there was some difference in comparison, but the host country institution was not completely different that the home institution. The host country institution was at least adequate for expatriates.

Table 12

Comparison of Home and Host Country Institutions

Sub-Question	\bar{x}	σ
Written and verbal communication	3.04	1.344
Transportation to host institution	3.37	1.275
Instructional and research facilities	3.44	1.155
Host institutional communication system	2.96	1.091

Note. Survey question eight: Please rate the following items regarding your perceptions of how different your host academic institution was in comparison to your home country institution (scale 1 = not different at all; 5 = very different).

Levene's test on three of the four sub-questions produced level of significance higher than the alpha and significant differences in the means cannot be assumed. However, one sub-question addressing language as a part of written and verbal communication produced a significance level of 0.010. The respective t statistic of -.998 did fall within the upper and lower significance level for alpha and significant differences in the gender means cannot be assumed. See the partial cut out of Table 13 and the complete Table 13 is reproduced in Appendix A.

Table 13 (Partial; see complete Table 13 in Appendix A.)

Independent Sample *t*-test Survey Question Eight

Please rate the following items regarding your perceptions of how different your host academic institution was in comparison to your home country institution (scale 1 = not different at all; 5 = very different).		Levene's Test for Equality of Variances		<i>t</i> -test for Equality of Means					
		F	Sig.	<i>t</i>	Sig. 2-tailed	Mean Difference	Std. Error Difference	95% Confidence	
								Lower	Upper
Communication System (IT)	EVA	4.707	.040	-.499	.622	-.224	.448	-1.146	.699
	EVNA			-.609	.549	-.224	.367	-.986	.539

Note. EVA = Equal Variances Assumed. EVNA = Equal Variances Not Assumed.

Table 14 incorporates eight alternative responses regarding what an expatriate academic would consider a positive experience. Respondents could select as many of the alternatives as they wanted. Most respondents noted the opportunity to travel to other countries as the most positive feature along with the 'other' option. Both options were selected by 85.3% of respondents. Generally, the results indicated the opportunity to interact with the host country and other foreign country cultures had an overall positive impact on the expatriate experience for academics. See the note after the table for a review of comments addressing written content provided by the respondents.

Table 14

Positive Features of Experience

Response	Frequency	Percent
The opportunity to travel to other countries	29	85.3%
Other	29	85.3%
Meeting new people	27	79.4%
Internal (home institution)	26	76.5%
Exploring new countries	25	73.5%
Competitive selection process	24	70.6%
Learning about a new culture	22	64.7%
The work experience gained as a result	22	64.7%

Note: Although 29 respondents included ‘Other’ as a part of their response to this question, only five respondents included any comments. Survey question nine: What were the positive features of your expatriate experience? Select all that would apply. If ‘other’ please explain.

Comments addressing positive features included making a connection to the students in the host country, the experience offered research opportunities, personal rejuvenation, serving as an American ‘cultural ambassador’ in the host country, and recognizing the development of different world views and perspectives of history, art, culture, language and values.

Over half of respondents, 52.9% had no negative feeling about their experiences noted in survey question ten. Respondents had six predetermined options as well as an option for ‘other’ (see Table 15). A majority of respondents, 76.5% selected ‘other’ as an option.

Table 15

Negative Features of Expatriate Experience

Response	Frequency	Percent
Other	26	76.5%
I had no negative feelings about my experience	18	52.9%
Language barriers	4	11.8%
Getting around	4	11.8%
Adjusting without having loved ones around	3	8.8%
Cultural barriers	2	5.9%
Dealing with host country nationals	1	2.9%

Note: Although 26 respondents included ‘other’ as a part of their response to this question, only eight respondents included any comments. Survey question ten: What were the negative features of your expatriate experience? Select as many as you would like. If ‘other’ please explain.

In the ‘other’ category for survey question ten, no common answers were noted and no themes are apparent for statistical analysis. Among the available comments were the water was bad and caused sickness, repatriation back to the United States after teaching in Taiwan was difficult, lack of collegiality, lack of office space, and poor heating were noted as negative issues while on the respective international assignment. It was impossible to identify additional themes as 18 respondents did not include comments on why they selected ‘other’ as a category for negative features as part of their experience.

Living arrangements may be a key factor for some expatriates when determining what makes an experience a positive one. When it came to where the expatriate lived while on assignment, just over half, 52.9%, of respondents reported living in host institution provided

housing (see Table 16). No respondents reported living with a host country family and six respondents did not address question 11. One respondent also noted they were given access to a car and driver by the host institution while on the assignment.

Table 16

Living Arrangements

Response	Frequency	Percent
Lived in housing provided by the host institution	18	52.9%
I had my own apartment or house to live in	7	20.6%
I stayed with a host family	0	0.0%
I lived in a hotel type of environment	3	8.8%
Missing	6	17.6%
Total	34	100%

Note. Survey question 11: Which of the following best describes your living arrangements while on your expatriate experience?

Expatriate academics' family ability to adapt to a host country may be an important factor in assessing expatriate success as the impact on a spouse and/or children is proven to be a significant failure or success factor for business expatriates.

The results noted 52.9% of respondents traveled to the host country with a spouse/significant other and/or one or more children. Only 26.5% reported traveling alone. If the expatriate reported traveling with a spouse or significant other or children, they were to continue to the appropriate question regarding the experiences of their traveling companions as requested to do so in the survey instructions.

When asked if their spouse was able to easily adapt to the host culture, 13 of the respondents agreed or strongly agreed and two reported having a spouse who was not able to easily adapt to the host culture. Seventy five percent of the spouses were able to engage interactively in the host culture at the agree or strongly agree level. A total of 31.3% of spouses were reported as having difficulties making host culture friends, while 68.7% of respondents reported at the neither agree or disagree, disagree, or strongly disagree levels. Language differences were not problematic for spouses as 75.0% were able to overcome language barriers. All but one of the traveling spouses was reported to be in good health while in the host country. See Table 17 for statistical review of traveling companions' ability to adapt to the host culture.

Eleven respondents reported traveling with at least one child. Eight of the eleven or 72.7% of those with accompanying children reported the children easily adapted to the host culture at the agree or strongly agree levels. The remaining three children were reported as having difficulty adapting to the host culture at the disagree level.

Addressing the ability of the children to interact with the host culture, 72.5% of the children were able to do so with the respondent reporting they agreed or strongly agreed. When it came to making friends, 36.3% of the children were reported to making friends. This was only at the agree level. The remaining children, 63.6% found it difficult to make friends according to the respondents. Language differences were problematic for the majority of children as seven of the eleven respondents reported their children having language difficulties at the strongly disagree, disagree or neither agree or disagree levels when asked if language differences were easy to overcome. None of the respondents offered additional comments on this topic.

Ten of the eleven children were reported to be in good health while the academic parent was serving on their expatriate assignment. Table 17 includes the mean and standard deviation

for each of the sub-parts of survey questions 13 and 14. Overall, the means ranged from a midpoint to over 4 of the 5 point scale and the standard deviations were within 1.5 deviations of the mean. This suggests accompanying traveling companions on average, were able to adapt to the host country culture.

Table 17

Traveling Companion Ability to Adapt to Host Culture

Sub-Question	\bar{x}	σ
Spouse easily adapted to host culture	4.19	0.981
Spouse interaction with host culture	4.13	1.088
Difficult for spouse to make friends from host culture	2.25	1.483
Language differences easy to overcome for spouse	3.44	1.209
Spouse health was good in host country	4.44	1.013
Child/Children easily adapted to host culture	3.50	0.905
Child/Children interaction with host culture	3.75	1.215
Difficult for child/children to make friends	2.58	1.240
Languages differences Easy to overcome for children	2.67	1.155
Child/Children health was good in host country	4.17	0.937

Note: If respondents traveled with a spouse and/or children or not, they were asked to continue to survey question 13 or 14. If not, they continued to survey question 15 accordingly.

The degrees of freedom for survey questions 13 and 14 varied in both survey questions because not all respondents had a traveling spouse and/or children with them. However, these topics are significant in the research because for those in business, the major cause of expatriate failure is the inability of the family member to adapt to a host culture and this factor has become a significant topic for formal training. There are five identical Likert type scale sub-questions for

each question. Survey question 13 asked about a traveling spouse and question 14 asked about traveling children. Question 13 has 14 degrees of freedom and question 14 has ten degrees of freedom. The results of Levene's test for significance provided no result less than the alpha of 0.05. Thus, statistically significant difference in the means cannot be assumed. By reviewing the level of significance and reviewing the t statistic, one can see from the data in Table 22 in comparison to Table 23 that children tended to have an easier time adapting to the host country cultural environment. See Tables 22 and 23 for the independent sample t -test results of questions 13 and 14 in Appendix A.

The majority of respondents, 58.8% did not answer this question presumably because there was no discernable significant family event which would have an impact on the expatriate returning home sooner than expected. One respondent elaborated on their respective response regarding a major family illness (see Table 18).

Although there were 14 significant family events, only one respondent made the decision to return home early. Returning early is generally considered as an expatriate failure event even though the expatriate may be performing as expected in their assignment. However, the respondent did return to complete their work in the host country.

Table 18

Significant Family Event

Response	Frequency	Percent
Major illness in the family	5	14.7%
Death in the Family	4	11.8%
Financial	2	5.9%
Other	2	5.9%
Birth of a child (yours)	1	2.9%

Note: Survey question 15: Did any of the following events occur while you were participating in the expatriate experience? Check all that apply.

Survey question 16 asked respondents if family issues were instrumental if the decision was made to return home early. As noted, only one respondent answered yes to this question. However, after a very short stay in the United States, the respondent went back to their host country to complete their expatriate assignment. Levene's test for significance was 0.161 and well larger than the alpha of .05 in survey question 16 and statistically significant differences between means of males and females cannot be assumed.

Survey question 17 is a five-point Likert type scale self-evaluative question which addressed the expatriate's perception of their self-identity which Bandura (1986) points out a positive self-identity leads to higher self-efficacy. In this case, a higher-self efficacy may lead the expatriate to perceive they had a successful expatriate experience. Nearly all respondents noted some changes in their self-identity as it related to cross cultural development and understanding and none of the respondents indicated they disagreed or strongly disagreed they had some change in their self-identity.

When asked if the respondent was more aware of how to survive in a foreign country, 70.6% indicated yes by answering that they agreed or strongly agreed. Only 8.8% indicated neither agreed nor disagreed and none of the respondents strongly disagreed.

Asked if they had changed in their understanding of cultural differences between home and host country cultures, a significant number of respondents, 67.6% had a change in their understanding of cultural differences between home and host culture. Although 19 of the respondents were in English speaking countries, many realized or confirmed a common language does not equate to a common culture. Of all respondents, only one individual noted no change in their understanding of the host culture compared to their home culture.

Reporting at the agreed or strongly agreed, 38.2% of respondents thought they were more conscious of their personal bias of their home culture and 17.6% disagreed or strongly disagreed they had a change in their personal bias of the home culture. On self-reflection, 61.7% of respondents agreed or strongly agreed they learned something about themselves as a result of their experience and 17.6% disagreed or neither agreed nor disagreed learning something about themselves from their expatriate experience.

It is not known why, but only 12 of the respondents addressed the question if they were more open to learning about new cultures. Of those, eight respondents said they agreed or strongly agreed and four indicated they disagreed or neither agreed nor disagreed.

A total of 76.6% of respondents felt as if they had personally changed as a result of their respective expatriate experience and one respondent strongly felt they had not personally changed. Finally, when asked about their understanding of sensitivity to cultural differences, 64.7% of respondents agreed or strongly agreed they were more sensitive to cultural differences

and 14.7% disagreed or neither agreed nor disagreed if they understood host country cultural differences prior to their respective experience.

Noted in Table 19, the mean and standard deviation for the sub-questions of survey question 17 generally lean toward a higher level of understanding of cultural differences between home and host cultures indicating the respondents left the host cultures with a higher level of understanding when it comes to cultural differences.

Table 19

Self-identity Changes as a Result of Being an Expatriate

Sub-Question	\bar{x}	σ
More aware of how to survive in a foreign country	4.52	0.700
Changed cultural understanding between home and host culture	4.19	0.786
Understood host country cultural differences prior to experience	4.11	0.901
More open to learning about new cultures	4.07	0.874
I learned about myself as a result of my experience	4.04	0.801
More conscious of personal bias of home	3.14	1.118
Have not personally changed as a result of expatriate experience	1.85	0.949

Note. Survey question 17: The following statements relate to your self-identification as a result of your experience as an expatriate academic; consider the contributions of this experience to your perceptions of yourself. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).

The results of the independent sample *t*-test indicated there was a level of self-identification recognition as it is related to living in a host country culture and recognizing changes to individual respondents and their view of self. This was true for both men and women expatriate academics with individual and combined means indicating statistically significant difference in the means cannot be assumed. Levene's test for equality of variances was larger

than the alpha of .05. For example, the mean of Likert type scale scores for understanding what it is like to live and survive in a foreign country was 4.52 on a scale with 5 being strongly agree. The combined mean for those saying the experience had not changed them was at 1.85, which is close to the disagree response on the scale (see Table 24 in Appendix A).

When asking if they would take on another expatriate experience, 79.4% of respondents either would do the same assignment again or prefer another location. While not a clear determinant of success, this number is indicative of the desire to expand cultural horizons. Although there are seven missing responses, none of those completing the survey indicated they would not take on another expatriate experience, but 17.6% indicated preferring another location.

A repatriate is someone who has returned back to their home country institution. Offered as many as nine choices regarding their feelings about repatriation, only one of the respondents reported a level of relief of repatriation by indicating they felt as if they had been gone forever and two indicated being relieved their time in the host country culture was over (see Table 20). Although 18 reported it was good to finally be home, this does not mean they had a poor experience. None of the respondents reported wishing they had never left home. Respondents were asked to check all of the alternatives that applied to their perceptions allowing for multiple feelings to be expressed. One point of interest is that 32.4% of respondents indicated they had to go through a process to reacclimatize to the home culture upon returning home.

Only six of the respondents offered written comments. However, 28 had selected 'other' as one of their choices. Among the six comments provided addressing the return home were language barriers, suffered a sabbatical 'hangover', did not want to go back to previous faculty position, it was comfortable coming home but want to go overseas again as soon as possible,

missed the student interaction in the host country, and the super markets were overwhelming on return. This latter response came from a respondent who had spent a year in the Middle East.

Table 20

Feelings as a Repatriate

Response	Frequency	Percent
Other	28	82.4%
I miss being on my expatriate experience	21	61.8%
It was good to finally be home	18	52.9%
I feel sad my time in the host country is over	16	47.1%
I feel that I have to reacclimatize myself	11	32.4%
It seems like I just left home	3	8.8%
I am relieved my time in the host country is over	2	5.9%
It seems like I have been gone forever	1	2.9%
I wish I had never left home	0	0.0%

Note. Survey question 20: Upon your return home, which of the following best describes your feelings? Select all that apply.

To summarize, the majority of respondents reported completing their respective assignment objectives and 70.6% of respondents reported little or no problems adjusting to the host country cultural environment. The majority of respondents, 64.8% reported they felt they were prepared for the assignment. The means and independent sample *t*-tests generally indicate the respondents perceived they had a positive experience. Generally living conditions were somewhat to significantly different from home, but not insurmountably different as to cause the expatriate to return early. There were also differences in the general perceptions of home and host cultural differences. Written and verbal communication was not significantly different for

the majority of respondents. In terms of host institution research facilities, a significant number of respondents, 47.1% indicated a noticeable difference and the respondents were generally able to communicate with host peers and gain access to information technology.

Several of the respondents traveled with a spouse and/or at least one child. Overall, the traveling companions were able to make the adjustment to the host country culture. It was a little easier for the traveling spouse to adapt than traveling children. Over half of the respondents lived in housing provided by the institution. Over half of the respondents reported having no negative feelings about their experience. However, outside of 'other', respondents reported some language barriers and some difficulty getting around. Of all respondents, only one had to return home early due to the illness of their spouse. They later returned to complete the assignment.

Respondents reported a higher consciousness of what it is like to live in a host cultural environment and were more aware of their personal biases of their home country culture. There quarters of respondents felt they had personally changed as a result of their expatriate experience. Upon their return home, respondents generally reported they were happy to be home, but at the same time reported having a positive experience in the host culture. Nearly a third of respondents reported having to reacclimatize back to the home country culture.

Cross Cultural Training

Similar to those in business, the majority of academic expatriates did not attend formal cross cultural training prior to departure. Only four of the respondents reported they had attended any kind of formal training for cultural awareness of the host country (see Table 21). However, it is positive to note 23 respondents had spoken with at least one previous visitor to the host country and 24 read about the country and its culture. Finally, 11 of the respondents had contact

with host country nationals and nine did some form of self-study on the host country language.

Two respondents included ‘other’ as their response, but did not offer any written comments.

Table 21

Formal or Informal Pre-departure Cross Cultural Training

Response	Frequency	Percent
I read about the country and the institution I would be visiting	24	70.6%
I spoke with others who had been to this country before	23	67.6%
I spoke with individuals ‘native’ to this country.	11	32.4%
I taught myself some of the language.	9	26.5%
I completed a language course.	4	11.8%
I attended a cultural awareness course designed for this experience	4	11.8%
Other	2	5.9%
My family and I attended a cultural awareness course designed for this experience	0	0.0%

Note. Survey question 21: How did you prepare for this expatriate experience (i.e. prior to leaving)? Check all that apply.

Survey question 22 asked respondents if there were any additional comments they had regarding their expatriate experience. This information would be used to identify additional opportunities for training design, recommendations and implementation. As in the case of previous questions where respondents left additional comments under the ‘other’ option, the comments here provide for little or no opportunity to clearly identify themes. However, in the case of this question requesting additional comments regarding the respondents’ experiences, there were three loosely identifiable themes from the 14 responses.

The first is in regard to self or formal training. Two respondents are recent Fulbright Professors. Part of the Fulbright experience is to attend a formal training program. One taught in Norway and the other Fulbright Professor went to Lithuania. The latter mentioned Fulbright participants had to go through cultural, institutional, and language training. Prior to departure, the respondent spent approximately four weeks attending respective training. The Institute of International Education, which oversees the Fulbright program, does not provide directly for family pre-departure training (IIE, 2010).

Other respondents commented they had done considerable reading on the host culture and country history prior to departure. Another respondent addressed language training as a must to adapt to their host country. They felt the experience was highly beneficial because of previous language training and spending time in the host country during an earlier experience.

Two of the respondents had been to the same country as expatriate academics previously and depended on their previous experience to reacclimatize to the host culture. In the same respect, two other respondents commented on their respective future expatriate experiences in academia. One respondent noted they will be taking their family on an experience in two years, and another was in the process of looking for future opportunities.

The third theme was the perceived impact on the respondents. None indicated regret for taking on their respective experience. However, five respondents considered the experience a significant event whether it was the experience on its own, or as a career changing and professional development opportunity.

One final and very curious response was the expatriate experience was a personal career saving event. This respondent indicated the experience was refreshing and enjoyed working considerably closer with students than at their respective home institution. This particular

respondent was not in jeopardy of losing their position at the home institution, but they were looking for a personal growth opportunity and may have been considering leaving academia. It should be noted the respondent was one of the interviewed individuals.

So as these responses are reviewed, many of the written comments are closely related to the questions of the research. For example, if formal and informal pre-departure cross cultural training took place and/or is highly recommended, if there are career expectations on the part of the faculty, and if the perception on the part of the respondents whether or not they had a successful experience as an expatriate academic.

To summarize, very few of the respondents had any form of formal cross cultural training. This is a problem mimicked for those in business. The majority of respondents reported having contact with host country nationals prior to departure, meeting with others who had traveled to the respective host culture, and reading about the history and culture of the host country. Just four respondents reported attending formal language or cultural training. None of the respondents reported having any formal training for their family.

Summary

The response rate of expatriate faculty was 53%. This represents 34 of 65 potential respondents. However, four respondents could not be reached. Seven of a possible fourteen administrators (50%) agreed to interviews and three international education directors reviewed the survey instrument prior to distribution. Three of the administrators were senior university officials including two chancellors and one provost. Overall response rate at the sample universities for this research was sufficient to complete the statistical analysis of the data. However, open ended qualitative comments had written reviews completed as there was very few additional comments which could be quantified via a coding process.

Self-selection and competitive selection for an academic expatriate assignment are even across all reporting respondents. The majority of respondents had their experiences in European countries while a few went to Southeast Asia, Central Asia, and Central America.

In addressing the questions of the research, the overall reasons for accepting an expatriate academic assignment had significant numbers in all but one of the pre-selected areas. The most was career expectations and the least was being encouraged by the university/employer.

In terms of training, the majority response was self-training by reading about the country history and culture followed by speaking with others who had been there. The lowest was noted to be completing a language course and/or attending a formal training program with four respondents each respectively. The data shows heavy reliance on self-training prior to departure. This mirrors a significant problem with those in business. Respondents perceived that meeting new people and exploring and learning about new cultures were the most positive aspects of their experiences. In making a comparison to success factor for those in business and those from academia, pre-departure training are both significant as is a well-designed selection process such as the CCAI for those in business and the selection process the Fulbright program uses. The generally shorter nature of expatriate academic assignments in comparison to those in business makes it more difficult to make direct comparisons identifying common success factors. More research is applicable in this respect.

In terms of institutional conditions supporting faculty, there is nearly complete consensus institutions do support faculty at least on a professional development level if not via funding to take on an expatriate position. Many respondents reported identifying opportunities via university sources. With the exception of one department chair, all administrators thought an expatriate experience may be beneficial to the career of the faculty member in terms of

promotion and tenure. Both sample institutions have an Office of International Education which works closely with faculty to identify, apply, and support the development of an expatriate experience. Addressing how an experience is measured as being successful, the statistical analysis made note of the correlation to the variables and success. The grouping variable for the independent *t*-tests of the data was gender. The most notable response was that 76.5% of the respondents felt the experience was beneficial to them as a person. At the same time, 76.5% of respondents clearly disagreed the experience was difficult or unpleasant.

Finally, there seemed to be no significant relationship to demographic factors, pre-departure training, family issues, institutional and career expectations and the level of success of the expatriate. The most significant factor among the nominal data was that the majority of respondents were males compared to females by a 3:1 ratio.

CHAPTER 5

CONCLUSIONS

This concluding chapter offers a brief review of the research, addresses the impact of the results, and makes recommendations for the future regarding the study, selection and training of academic expatriates as related to the chances for a successful cross cultural adaptation to a host culture. Topics covered in the concluding remarks include a comparison of the research findings of expatriate academics to the literature review, selection practices, career expectations of the expatriate academic, cultural development, what defines success or may contribute to expatriate academic failure, training for expatriate academics, similarities between academic and business professionals, and related recommendations.

Summary of the Manuscript

To date, published literature addressing expatriate academics in terms of selection, cross-cultural adaptation, training awareness, and how an academic expatriate assignment could be defined as successful is limited to just a few academic quality journal reviews and qualitative dissertations. These topics for those in business have been thoroughly researched and continue to be the main focus of expatriate related research. The problem of the research is the lack of data addressing academics as expatriate, while there is significant data addressing business expatriates. This purpose of this research was to identify what makes an academic expatriate experience successful. In considering the purpose and problem statements, the questions of the

research were developed. These included what is the reason for expatriation, what training the academics had, if they perceive their experience as positive or not, what factors contribute to a successful experience, is there institutional support, and what demographic factors contribute to a successful expatriate experience? The respondents for this research are recent former expatriate academics from a sample of two AASCU institutions from United State Midwest.

The methodology used a current status study approach using a survey instrument. Respondents were asked demographic questions for classification purposes and several questions regarding their perceptions of their experience as related to the questions of the research noted above. Descriptive statistics, frequency counts, and standard deviations were determined. The main statistical test was the independent sample *t*-test using gender as the grouping variable. The ratio of males to females responding to the request to participate was 3:1 in favor of males.

Overall, the results of the analysis showed academic expatriates were largely self-selected to expatriate, but in terms of going on the assignment, the results noted a 50/50 split between those who went via a competitive application process and those who created their own assignment. Also, there is an expectation that expatriation will enhance the chances for promotion and tenure. Only four of the respondents reported any kind of formal cross-cultural training prior to expatriation. This can be problematic as the number one reason for overall expatriate failure is the inability of the expatriate and/or their traveling family to adapt to the host culture. Finally, at the administrative level, there is generally strong support for academics to seek an expatriate assignment, but there are few resources to financially support academics seeking an international experience.

Findings Compared to Literature Review

As noted in Chapter 1, there is very little research on the selection, training, cultural adaptation, and success factors for academic expatriates. Three previous doctoral dissertations have focused on qualitative aspects only and the scale of the research had been limited to small groups with as little as eight respondents having their expatriate academic experience in only a few host countries. There are no quantitative studies specifically addressing expatriate academics and very little quality research journal articles on the same subject. However, there are considerable numbers of quantitative dissertations, books, and journal articles on the expatriate selection, training, and cultural adaptation process for those in business. This problem led to one of the questions of the research comparing success and failure factors of the similarities and/or differences of those in business to the expatriate academic. This research is part of the process to close the gap by looking more closely at the experiences of expatriate academics.

There are several comparisons which can be made between expatriate academics and those from business based on the findings. These include selection, career implications, pre-departure training, cultural adaptation, and success and failure factors.

Selection

For those in business, there are multiple types of selection processes including taking cultural adaptability inventories, selection as part of career development, and selection based on results from home country career activities. Many individuals take some form of formal assessment such as the Cross Cultural Adaptability Inventory. For those in academia, self-selection for an academic expatriate experience is more the norm than the exception. Some respondents did make note of competitive selection processes. This would include the Fulbright Professorship Program as the most competitive noted among the respondents, the Centers for

International Business Education and Research programs, and the Wisconsin in Scotland program as noted by respondents at the sample universities. However, the majority of respondents identified or created their own opportunity to teach abroad. Although not noted for those in business, the majority of academics were in the 36-55 age range and were either associate or full professors. There appears to be little opportunity for lecturers and/or academic staff and no specific reasons were given for the small number of non-faculty academics taking on an expatriate academic experience. This may be due to the issue of academic staff being primarily hired to work specifically at the home country institution.

Career Implications

Many in business take on an expatriate assignment because it is expected as part of one's career. This is even more applicable in the senior ranks of businesses. For example, the current Controller of Medtronic spent a two year stint in Europe before being promoted to Controller. Still, for others the expatriate assignment was part of a short-term project based assignment. But the literature did note many of those in business are not self-selected as they are in academia.

There are more career implications for those in business. However, in the responses from academics related to career implications, it is interesting to note that some of the faculty respondents did believe the experiences may improve their chances of promotion and tenure.

Of interest to note related to career implications is one department chair indicated taking on an expatriate academic experience can be a distraction to one's career to the point of avoiding more difficult work at the home institution. On the other hand, senior administrators interviewed noted the salient aspects of an expatriate assignment for those who aspire to top administrative positions. One senior academic administrator in particular noted specifically an expatriate academic position may be a key factor to a leadership position beyond the department chair level.

and gave emphasis to those looking to move into the provost or president/chancellor position. To be fair, there are many other requirements that may outweigh an international academic assignment for someone applying for a provost or university president position which are not part of this research.

Pre-departure Training

This is one area where commonalities do exist among those in academia and business. The implication is there is a parallel lack of universal pre-departure training for academics and those in business. True, many organizations do have some form of formal pre-departure training. This would include the extensive training a multinational corporation such as Caterpillar Tractor Company which arranges for language training, cultural training, job training, training on the idiosyncrasies of the host country, and other expatriate needs. However, many companies do considerably less to nothing in terms of pre-departure training as noted in the literature review.

For those in academia, there is also a notable range. As noted by former Fulbright program respondents, they received extensive training prior to departure. The Wisconsin in Scotland program also had a formal one day pre-departure training event, but it does not come close to full cross cultural understanding. This one-day event focused on the activities of living and working at Dalkeith Country Palace near Edinburgh, Scotland. In terms of cultural training, the training included content on the generalities of the local population, getting around the Edinburgh area, and some of the day-to-day expectations. Of note however, is the Wisconsin in Scotland training did include the spouse or significant other of the trainee if they desired to attend. This was the only academic training program noted in this research which included a spouse or significant other.

Only one respondent indicated they had been in a country prior to going back for their academic expatriate experience. The literature noted this may be a key success factor for those in business, but there is no clear evidence to support the same conclusion for those in academia.

Another area of commonality is expatriates in both areas did their own pre-departure training. This includes reading about the history of a particular country, studying the culture, attempting to learn at least some of the language if going to a non-English speaking nation, and trying to identify living options. Respondents also used technological means to learn about the host country. The Internet provides for a vast amount of knowledge on cultures throughout the globe and can provide for a fast and inexpensive opportunity to learn about a host culture.

Many of the academics were provided living quarters either at or nearby the host country institution. Five of the respondents indicated they lived in the same building as their students.

Finally, as with those in business, there were some who went to the host country environment ‘cold turkey’. That is to say they got the assignment and just went without any pre-departure training. For those in business, the eventual culture shock and inability to adapt to the host culture is the number one reason for expatriate failure. However, for those academics that went cold turkey, there were no clear indications of catastrophic failure.

One thing is clear in making a comparison regarding training. On average neither those in business or academia receives adequate pre-departure cross cultural training. For those in academia, there is considerably less formal training than those in business. The majority of academic respondents noted they conducted their own self-training. Very few of the respondents indicated a traveling spouse or significant other was included in any form of training. This seems to be the norm in business as well based on the review of literature. Future expatriate training programs should include the family of the expatriate in formal training to the extent possible

Cultural Adaptation

As noted in the introduction and literature review, for those in business, the inability to adapt to a host country's cultural environment is the number one reason for expatriate failure (Ashamalla, 1998). Studies noted this may be due to poor selection processes, location of expatriation, family problems, and workplace difficulties among others. The business expatriate failure rate is very high ranging from 50%-80% for those in business from the United States. The reason for such a range is the differing definition of expatriate failure. Failure can range from returning home early to quitting at the home country workplace upon return from an assignment to staying on the job in the host country until the scheduled end of the expatriate assignment, but not meeting the overall objectives of the job.

In comparison to those in business it is much more difficult to quickly determine if an academic expatriate assignment was a failure based on the ability to adapt to the host culture and what if any cross cultural training academics had prior to their respective experiences. This research made note of the fact that only four respondents had some form of formal pre-departure host country cultural training.

Outside of considerable formal training, these training related activities tend to be beneficial to those from business and academia. To continue this concept one step further, once an individual and/or their traveling companions are in the host country, the literature shows having an in country contact may be of great importance to learning more about and adapting to the host country culture. Having someone help with something as simple as finding a grocery store may reduce stress related to expatriation.

Success and Failure Factors

There are multiple factors that lead an expatriate to a successful outcome. Among the most notable for those in business to have a successful outcome to their expatriate experience is to be properly selected, to be offered and attend cross-cultural training including language training. Even better would be for family to attend the same training. An additional opportunity would be for continued in country training, having a home institution buddy looking out for the interests of the expatriate. Also, having a local host contact to help with housing, school for children, developing an understanding of the local transportation and information technology system, and giving the expatriate a general introduction to the host country culture could be quite beneficial. The biggest failure factor for business is the inability to adapt to the host culture for the expatriate and/or their traveling companions. Other failure factors include not meeting performance objectives, apprehension over future professional opportunities upon the conclusion of the assignment, traveling with family members who are not able to adapt to the host culture and none to minimal pre-departure training.

For those in academia, identifying specific failure factors is not as easy to determine. In some cases, just going on the expatriate assignment is considered success. This is due primarily to the fact that academic expatriate experiences have well defined time spans, the academic is contracted for the specific assignment and if they returned early, there would be contractual problems to resolve. However, that is not to say there could be issues which may be problematic for an expatriate academic. As noted in survey question six, one respondent left their assignment early, one respondent did not meet the objectives of their assignment, two respondents indicated the experience was limiting professionally and one respondent noted the experience was difficult and unpleasant. The later respondent, they did not elaborate on their experiences.

In addressing perceptions of the host culture, respondents were evenly spread out across transportation, language, information technology and the daily routine. Each of these areas had positive and negative responses. Specifically addressing any negative features of the expatriate experience, 18 of the respondents indicated no negative features. Local transportation, or getting around and cultural barriers were the two most selected of the pre-determined items for respondents to select from. But there were also eight comments in the other area noting a negative aspect. Most are just one time comments on something that happened while in the host country. However, two were specifically noting the problems with colleagues at the host institution and one noted the water made them sick. There were no comments specifically related to culture. However, there are regions of the globe where the local population may consume water, but visitors who drink the same water may become ill. The latter is from a personal experience of the researcher who was in St. Petersburg, Russia where the water at the time was parasitic to visitors. The researcher had consumed a soft drink made with ice from local water.

Considering positive aspects of the experience, there was near universal agreement that meeting new people, exploring new countries, learning about a new culture, and the overall experience gained as a result were highly positive. For those in business, these outcomes are similar compared to expatriate academics.

One item which should be noted in making the comparison to those in business is the fact that the majority of academics surveyed returned to their respective home country institution. For those in business, an expatriate failure can mean leaving the business, or not having a clearly defined job upon return to their respective home country business.

Conclusions Specific to Academics

When determining the statistical test to apply to the survey, the independent sample *t*-test was selected. This test requires a grouping variable to analyze data. Gender was selected because it has two clearly identifiable groups. The data shows the results specifically for academics and the relationship among demographic characteristics, family issue that may have affected the success of the academic, institutional and individual career expectations, and the impact of cross cultural training and cultural adaptation of the expatriate academic.

Academic Selection

The proper selection of an individual for an expatriate experience has been proven to be a key factor for a successful international assignment. For those in business, there are several well proven instruments such as the Cross Cultural Adaptability Inventory. However, these instruments have not been adequately applied to those in academia. As a matter of fact, within the sample institutions, the majority of academic expatriates were self-selected. Meaning they sought out their own respective expatriate experience and no selection instrument was used to gage their potential for a successful international experience. Still, half went through some form of competitive process based on already having tenure, research expectations, experience, and/or the courses they could teach while on an expatriate assignment.

On the high end of the competitive scale noted in the research is the Fulbright Professorship program, which is highly competitive and the applicant must be a tenured professor prior to their assignment. On the lower end of competitive selection is the Wisconsin in Scotland program where faculty from five universities submit five courses they could teach and the respective international education directors from consortium universities make selection decisions based on a rotation of courses and discipline topic areas. The Wisconsin in Scotland

program also considers previous international academic experience, scholarship as secondary selection criteria and previous work with student based organizations.

There currently is no known selection instrument specifically designed for academics applying for an expatriate experience. Selection instruments generally assess the ability of an individual, and sometimes their traveling family, to adapt to the conditions of living daily life in a foreign country. Many of these instruments are well proven to help select those who would be most adaptable to a host culture. This is clearly a shortfall in terms so of selection of academic expatriates. Selection by committee does not necessarily mean an individual is adaptable to one or more foreign country cultural environments. In the field of cross cultural training, selection instruments have been proven to help identify where an individual may fall short and training can be adapted to improve the chances for a successful expatriate experience.

Academic Career Expectations

As noted in the research, academics and the majority of administrators have some level of career advancement expectations as a result of taking on one or more expatriate academic experience. Senior administrators in particular noted the usefulness of an expatriate experience as being part of a career advancement process for those aspiring to upper administration in academia. This is in direct parallel to those in business. One senior administrator indicated if an individual or group of academics can work to develop programs with foreign institutions for student and faculty exchanges, this is favorably looked upon by administrative position search committees at many institutions. Still, while expatriate academics do expect some form of career recognition for their expatriate assignment, at least one department chair surveyed thought it would be a distraction to career development and even indicated it may be a way of avoiding more strenuous duties.

This later statement by a department chair was not an option in the survey instrument given to academic respondents, however it may be useful to incorporate into a selection instrument to be tested to see if there is a kernel of truth to the possibility of taking on an expatriate assignment would be a reason to avoid professional responsibilities at the home institution. As noted earlier, two of the respondents for this research retired upon the completion of their expatriate assignment. It is not known if avoiding home institution duties was one of their reasons for the expatriate assignment or for retirement.

Lastly in addressing career expectations, it was interesting to note that at least one respondent considered the expatriate experience a rejuvenating and career saving experience. It would be interesting to know more why this respondent reacted in this manner. It is recommended respondents be given more options in this respect in future studies to identify the possibility of career rejuvenation. In addition, it may be interesting to find out more why the concept of career rejuvenation may be tied to an expatriate experience.

Academic Cross Cultural Development

The only way an individual can become an expert of a foreign culture is to live a lifetime within that culture (Ball, 2009). While ideal, this is just not possible if academics are to travel abroad and gain international experience they can ultimately bring back to their home country classroom. At some level, an individual needs to develop their multicultural cadre if they seriously want to excel and be successful in a host country environment. This research noted that many academics have had previous international experience, spoke with people who have been to the host country, or have had some form of interaction with host country nationals prior to their international assignment. In some cases, the respondents also spent time reading about the host country culture and history. Research has shown for those in business to develop cultural

development skills; they should spend pre-assignment time in the host country prior to their extended expatriate assignment. This may not be practical for academics on limited budgets and schedules. However, prior to applying or identifying an expatriate academic opportunity, the individual should spend time fully researching the location of where they want to go, what the culture is like, how others have adapted to that particular culture, and if there are any free or low-cost opportunities for some form of cross cultural developmental opportunities.

One benefit of academic institutions is many have an international programs or international education office. Both sample universities for this research have an international education office and both offer opportunities for aspiring expatriate academics to learn at least some of the basics about culture in the countries they may be traveling to. As a former expatriate academic, this researcher would not recommend going ‘cold turkey’ into a host country environment regardless of speaking a common language. While that may be okay for the tourist who stays within the norms of being a tourist, for someone who will be living in a host country environment, advanced cultural understanding beyond the local attractions is a necessity.

Academic Success and Failure

The underlying reason for this research has been to determine factors leading to a successful experience for an expatriate academic. So much is known about those from business, but very little about success and failure for academics. There are multiple ways to define expatriate academic success and failure. This research begins to explore both topics. Only one faculty member returned home early from their expatriate assignment and that was primarily due to the illness of a traveling spouse. However, any early return in business is included in the definition of expatriate failure. Since this research is tied closely to cross cultural training and cultural adaptation, this leads to the focus area for success and failure of expatriate academics.

One of the more clear identifiers of failure is if an expatriate does not complete their assigned objectives. This is true for those in business as well as in academia. One of the respondents indicated they did not complete their objectives. However, 26 respondents indicated they did complete objectives and seven left the item blank. The mean on the Likert type scale was 4.48 in the direction of completing assignment objectives. As a self-reporting item, there is strong indication of success in terms of meeting objectives. The number of those experiencing cultural adjustment problems was slightly higher, but still 70.6% indicated they were able to adapt to the host culture. This is another positive item indicative of possible expatriate success. Seventy point six percent also indicated they stayed in the expatriate position their full assignment time. However, staying in country the full time is not necessarily an indicator of success or failure. Other factors such as meeting objectives need to be considered as well. Very few academics went to the host country feeling unprepared at some level. Most, 64.8% felt they were adequately prepared for the assignment, although considerably fewer had any form of formal cultural training prior to departure and 17.6% of respondents felt unprepared.

Adapting to different living conditions of an expatriate assignment can also be an indicator of success or failure and 58% felt the living conditions were very different to about the same as their home country living conditions. Many of the general daily living routines were not terribly disrupted during the expatriate assignment. It would be more appropriate to indicate the daily routine including things such as shopping, food and drink, local transportation, communication infrastructure were somewhat different to very different compared to the home country and home country institution. However, there were no indicators in the additional comments that would lead the researcher to conclude completely inhospitable living conditions to the point of forcing a return home. Access to information technology was also quite acceptable

for the majority of respondents. All of these factors combined with positive results may lead to a positive and successful experience, but none of the respondents indicated such poor living conditions and communication aspects as to suggest a negative overall reaction.

There were several other positive correlations that would lead to a successful expatriate experience for the respondents. The majority from 64%-85% reported specifically several positive aspects of their experience as noted in survey question nine of the instrument. In this same respect the significantly high number of respondents indicating no negative feelings of their experience also leads to the conclusion expatriate academics, when reasonably prepared, find ways to adapt to the host country culture. Negative numbers were very low even in addressing language and cultural barriers.

The results of the respondents traveling with a spouse or significant other and/or children are also generally positive. However, the results also indicate it was easier for children to adapt to the new culture than a spouse or significant other. Additional research is recommended to determine why this would be true. It may be that children are more adaptable to new environments or that a spouse or significant other has a more difficult time adapting. In business, one of the failure factors is the spouse who travels with the expatriate often do not have much to do when the expatriate is at work leading to a sense of loneliness. It should be noted that in many large urban areas around the globe, there are associations of American expatriates who gather and offer support to the traveling partners of expatriates. Presumably, these associations would be open to anyone regardless of the occupation of the expatriate.

Finally in addressing success and failure factors, the results showed that the expatriates scored significantly high in terms of learning about themselves, their self-identification, recognizing their cultural biases, and being more open to learning about new cultures.

Expatriate Academic Training

Pre-departure training is a key factor of success for those in business. As noted in the literature review, there are several aspects to pre-departure training including language, cross cultural adaptation, pre-expatriate experience visits to the host country, including family in the selection and training process, and continued in-country training to name a few. The research from the sample institutions indicates there are considerably less opportunities for formal training as there is for those in business. Although not all business organizations reach the level of training noted above. When asked about their respective training, the majority of respondents for this research indicated they and/or traveling family had very little or no formal training. Only four of the respondents noted any kind of formal training and four have some form of formal language training (possibly the same four, but this is not known). None of the respondents indicated their traveling partner or children were included in the cross cultural training. Although it cannot be determined if there is specific overlap of responses, 24 of the respondents read about the host country history and culture, 23 spoke with others who had been to the country previously, and 11 had spoken with individuals native to the respective host country.

Because there were enough responses to a lack of formal cultural training or other pre-departure training, and because there are reasonable numbers of respondents who had some negative feelings or problems within the host culture, this leads to the conclusion there are training needs at the respondent institutions. This may be true across other similarly sized institutions and international programs. Further research is needed to make this determination. However, there is still a concurrent problem with regards to training needs. When only four respondents indicated some form of formal cultural awareness training prior to departure, this

leaves a seriously large percentage regardless of the sample or response size of a need to address cultural training for academic expatriates.

Selecting the wrong individual or not providing adequate training could lead the expatriate academic to have a failure experience. A business expatriate failure can cost a business \$250,000.00 to over \$1 million dollars in terms of selection, training, moving and lost business. While the immediate cost of academic expatriate failure may not be as high, failure can still come with a significant cost in terms of money as well as the possibility of losing a continued relationship with a host country institution.

Selection along with proper training is a key to success for those in business and based on the results of this research, it may very well be the same for those in academia. As the global economic environment continues to become more interdependent, the trend in higher education is following in the same path. Institutions across the globe are creating partnerships with other institutions of higher education or they are building their own from scratch. In Wisconsin for example, the state's two-year system colleges are implementing an exchanges agreement with the Chinese education system to bring approximately 1500 students to Wisconsin. Once the students complete their two-year program, approximately half are expected to transfer to the University of Wisconsin-Stout to complete a four-year degree. This agreement is opening doors for faculty from Wisconsin to travel and teach courses in China as well. A similar agreement is in the works with a university in India. These are not isolated opportunities for expatriate academics. Mentioned earlier in the literature review is the fact that all of Australia's public institutions have satellite campuses in various Southeast Asian nations. Many universities across the globe have similar arrangements.

Cross cultural opportunities for faculty and higher education as a whole are continuing to grow. The higher education industry needs to ensure faculty with an aptitude for expatriate cross cultural adaptation are ready to make the leap from home institution to foreign institution. Universities can help with this transition by ensuring expatriate academics are properly trained to meet the challenge of living and working in a host culture head on.

Even for faculty who teach classes from Terre Haute that are broadcast via broadband to India would need to be trained to understand the learning model of Indian students. The applications of technology have helped to grow the need for faculty with an international cadre. There are no indications the growth of international educational opportunities will slow or stop for students and faculty. This research provides the reader an opportunity of understanding the academic expatriate process. More research is needed to fully determine all of the training needs. Academics are striving to learn more about host cultures on their own and initiate their own self-training, but the results of this research indicate more can be done and more needs to be learned.

Finally, as one considers the similarities between business expatriation and expatriation for those in academia, there is the common need to be as prepared as possible for the expatriate process. However, there are other similarities. A business organization expands into foreign markets in search of new opportunities to increase income, to expand beyond a saturated market, and/or to tap into resources which are in more abundance or less costly than in the home market. This process of bringing the globe closer together economically is a trend many years in the making and does not seem likely to diminish in the foreseeable future. The need to send experienced and knowledgeable employees to the foreign markets is clearly connected to the ultimate success of a business to establish their international markets. This is not unlike the growth model for many universities across the globe as mentioned earlier. Universities are also

increasingly more visible in foreign countries and working hard to expand their reach to access a diverse student and faculty population.

However, there are also many differences. The most notable differences are those relating specifically to the expatriate. An academic is generally not expected to spend time teaching or conducting research in other countries, they make the choice to do so. The academic will seek out an international assignment for different reasons than those in business. A business expatriate may be expected to spend two years, say in Brazil as part of their career progression. Business expatriate failure can be very costly to the organization in terms of money and lost business as well as the potential for the loss of prestige of the business. Expatriate academics have the flexibility of selecting what host country they will go to, what their responsibilities are going to be, and possibly most importantly, they know the exact time frame for their expatriate experience. If they are not happy or otherwise dissatisfied with their respective expatriate assignment, they know it may last for just so long. In business, there is pressure to perform to exacting standards in the most efficient way possible. While this same quality is expected in academia, the expatriate academic generally has the flexibility to manage their courses or research in a manner generally suited to their respective styles.

In addition, this research makes note of the fact that expatriate academics take on international assignments because they enjoy the opportunity whether or not there is intent for career development. Sometimes there is institutional support in terms of a financial commitment, but quite often there is little or none. To go a step further, universities need to decide how much they will support the concept of international education programs. For students traveling to foreign countries, there is often a financial benefit to the host university, whereas sending faculty is an expense item and sometimes more difficult to justify. Expatriating faculty members are

often left to their own accord to find financial support. Universities and other institutions should develop strategic plans for student and faculty international experiences and try to avoid the paradigm of testing the international waters and backing off before it has time to be judged a success. This often comes with differing expectations of senior administrators. Economically, there is a growing global trend to expand online and distance education programs in home countries and as noted in the literature review, more universities are establishing entire degree programs taught in host countries.

Recommendations for Additional Study

It is highly recommended additional research is conducted to determine if existing selection instruments such as the CCAI and others can be adequately applied to academics. If not, it is also recommended an academic expatriate selection instrument be developed and validated as more institutions are sending faculty to satellite campuses. For example, this researcher's institution is in the process of developing a faculty and student exchange program in India. The Indian culture, while a significant number of Indians speak English, is quite different and requires an ability to adapt.

It is also recommended the instrument used for this research to be refined to employ the highest possible robust research applications. While the instrument provides a starting point, there is room to grow the instrument to be applicable to more academic expatriate topics including surveying current expatriate academics as well as those who have returned from an assignment.

In terms of recommendations regarding self-identity, a selection instrument should include a measure of someone's ability to recognize their biases and willingness to be open as well as a measure of self-efficacy to identify if someone recognizes they can make changes in

their habits and abilities in adapting to a host culture. In this case, the selection instrument would need to include content about adapting to a foreign academic institution as well.

Further study should address the potential of academic expatriate failure in more detail. It is possible due to the relatively short-term average time spent in the host culture compared to multi-year assignments for some in business; the academics may have just finished out their assignment knowing it had a definite end date. More research needs to be done on cross cultural training and determining if an expatriate academic has truly had a successful transition to adapting to a host country cultural environment.

Additional research is recommended to determine how the respondents defined living conditions. As cultures are different across the globe, living conditions may also be dramatically different. For example, living conditions in Vilnius compared to Ankara are on average considerably different from each other. However, they may not be different to the expatriate.

Finally, it is important to make an additional note regarding academic expatriate, training, and technological applications. Foster (1999) wrote that technology is the sum of human endeavor. To become an expatriate, to travel, to be a learned scholar, it would not be possible without human endeavor. It is that endeavor which leads to new opportunities including the opportunity to live and work in other countries as an expatriate academic.

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APPENDIX A: TABLES 9, 11, 13, 22-25 AND FIGURES 1-38

Table 9

Independent Sample *t*-test Question Six

Please rate the following statements regarding your perceptions of your most recent expatriate experience by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree		Levene's Test for Equality of Variances		<i>t</i> -test for Equality of Means					
		F	Sig.	<i>t</i>	Sig 2-tailed	Mean Difference	Std. Error Difference	95% Confidence	
								Lower	Upper
I completed all of the objectives of the project successfully.	EVA	1.765	.196	2.023	.054	.684	.338	-.012	1.381
	EVNA			1.438	.189	.684	.476	-.418	1.786
I experienced considerable problems adjusting to the culture.	EVA	1.178	.288	-.890	.382	-.349	.392	-1.156	.458
	EVNA			-.690	.508	-.349	.505	-1.500	.803
Amount of time in country. 1= left almost immediately; 5=stayed full time.	EVA	3.300	.081	1.255	.221	.487	.388	-.312	1.286
	EVNA			.948	.370	.487	.513	-.689	1.662
I was unprepared and did not know what to expect.	EVA	2.588	.122	.157	.876	.072	.460	-.876	1.020
	EVNA			.130	.899	.072	.556	-1.178	1.323
My international colleagues were satisfied with my work.	EVA	.108	.745	.553	.585	.188	.340	-.513	.889
	EVNA			.559	.587	.188	.336	-.552	.928
I felt the experience was beneficial to me as a person.	EVA	8.296	.008	1.755	.092	.592	.337	-.103	1.287
	EVNA			1.188	.271	.592	.498	-.573	1.757
I felt the experience did not provide me with adequate professional benefits.	EVA	6.760	.015	-1.657	.110	-.816	.492	-1.830	.198
	EVNA			-1.344	.211	-.816	.607	-2.186	.555
This experience opened other opportunities for me.	EVA	3.135	.089	1.063	.298	.520	.489	-.488	1.527
	EVNA			.897	.391	.520	.579	-.777	1.816
Overall, the experience was difficult and unpleasant.	EVA	9.924	.004	-1.558	.132	-.520	.334	-1.207	.167
	EVNA			-1.033	.334	-.520	.503	-1.699	.660

Table 11

Independent Sample *t*-test Question Seven

Please rate the following items regarding your perceptions of how different the host culture was in comparison to your home country culture (scale 1 = not different at all; 5 = very different).		Levene's Test for Equality of Variances		<i>t</i> -test for Equality of Means					
				<i>t</i>	Sig. 2-tailed	Mean Difference	Std. Error Difference	95% Confidence	
		F	Sig.					Lower	Upper
Living conditions (housing, bathrooms, and the like)	EVA	.034	.586	-.670	.509	-.309	.462	-1.260	.641
	EVNA			-.638	.536	-.309	.485	-1.366	.748
Shopping	EVA	.057	.814	.397	.695	.171	.431	-.716	1.059
	EVNA			.394	.700	.171	.434	-.767	1.109
Food and drink	EVA	.331	.570	.463	.648	.211	.455	-.727	1.148
	EVNA			.435	.672	.211	.484	-.848	1.270
Language (i.e., verbal & written communication)	EVA	.202	.657	-1.974	.060	-.987	.500	-2.017	.043
	EVNA			-1.995	.067	-.987	.495	-2.051	.078
Transportation	EVA	.000	.993	-.539	.595	-.224	.415	-1.078	.631
	EVNA			-.523	.610	-.224	.428	-1.152	.705
Communication System (IT)	EVA	4.707	.040	-.499	.622	-.224	.448	-1.146	.699
	EVNA			-.609	.549	-.224	.367	-.986	.539
The daily "routine"	EVA	.726	.402	-.886	.384	-.428	.483	-1.422	.567
	EVNA			-.998	.332	-.428	.429	-1.330	.474

Note. EVA = Equal Variances Assumed. EVNA = Equal Variances Not Assumed.

Table 13

Independent Sample *t*-test Survey Question Eight

Please rate the following items regarding your perceptions of how different your host academic institution was in comparison to your home country institution (scale 1 = not different at all; 5 = very different).		Levene's Test for Equality of Variances		<i>t</i> -test for Equality of Means					
		F	Sig.	<i>t</i>	Sig. 2-tailed	Mean Difference	Std. Error Difference	95% Confidence	
								Lower	Upper
Language (i.e., verbal & written communication)	EVA	7.745	.010	-.843	.407	-.480	.570	-1.653	.693
	EVNA			-.686	.510	-.480	.700	-2.059	1.099
Transportation	EVA	.269	.608	.313	.757	.171	.547	-.956	1.298
	EVNA			.315	.758	.171	.543	-.998	1.340
The Institution's instructional and research facilities	EVA	.553	.464	-.889	.383	-.434	.489	-1.441	.572
	EVNA			-.947	.358	-.434	.459	-1.410	.541
Communication System (IT)	EVA	2.727	.111	-.883	.386	-.408	.462	-1.359	.543
	EVNA			-.989	.336	-.408	.412	-1.276	.460

Note. EVA = Equal Variances Assumed. EVNA = Equal Variances Not Assumed.

Table 22

Independent Sample *t*-test Survey Question Thirteen

If a spouse/significant other traveled with you, please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).		Levene's Test for Equality of Variances		<i>t</i> -test for Equality of Means					
		F	Sig.	<i>t</i>	Sig. 2-tailed	Mean Difference	Std. Error Difference	95% Confidence	
								Lower	Upper
My spouse or significant other easily adapted to the host country cultural environment.	EVA	.495	.493	-.724	.481	-.417	-1.651	-1.651	.818
	EVNA			-.979	.350	-.417	-1.361	-1.361	.528
My spouse or significant other easily adapted to the host country cultural environment.	EVA	.219	.647	-.257	.801	.167	.649	-1.558	1.224
	EVNA			-.285	.785	.167	.585	-1.583	1.250
It was difficult to make new friends from the host country for my spouse or significant other.	EVA	1.151	.301	.378	.711	.333	.882	-1.558	1.225
	EVNA			.398	.705	.333	.838	-1.747	1.214
Language differences were easy to overcome for my spouse or significant other.	EVA	1.980	.181	.827	.422	-.583	.706	-.930	2.097
	EVNA			1.048	.323	-.583	.557	-.684	1.851
While in the foreign country, my spouse's or significant other's health was good.	EVA	.423	.526	-.135	.894	-.083	.616	-1.404	1.237
	EVNA			-.188	.854	-.083	.443	-1.058	.891

Note. EVA = Equal Variances Assumed. EVNA = Equal Variances Not Assumed.

Table 23

Independent Sample *t*-test Survey Question Fourteen

If a child or children traveled with you, please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).		Levene's Test for Equality of Variances		<i>t</i> -test for Equality of Means					
		F	Sig.	<i>t</i>	Sig. 2-tailed	Mean Difference	Std. Error Difference	95% Confidence	
								Lower	Upper
My child or children easily adapted to the host country cultural environment.	EVA	.741	.418	.000	1.000	.000	.735	-1.637	1.637
	EVNA			.000	1.000	.000	.587	-2.703	2.703
My child or children easily adapted to the host country cultural environment.	EVA	.268	.616	1.732	.114	1.500	.866	-.430	3.430
	EVNA			2.423	.121	1.500	.619	-.875	3.875
It was difficult to make new friends from the host country for my child or children.	EVA	1.736	.217	.099	.923	.100	1.007	-2.144	2.344
	EVNA			.065	.958	.100	1.545	-15.040	15.240
Language differences were easy to overcome for my child or children.	EVA	1.207	.298	1.693	.121	1.400	.827	-.443	3.324
	EVNA			2.298	.140	1.400	.609	-1.056	3.856
While in the foreign country, my child's or children's health was good.	EVA	.217	.651	-.533	.606	-.400	.751	-2.073	1.273
	EVNA			-.677	.571	-.400	.591	-3.054	2.254

Note. EVA = Equal Variances Assumed. EVNA = Equal Variances Not Assumed.

Table 24

Independent Sample *t*-test Survey Question Seventeen

The following statements relate to your self-identification as a result of your experience as an expatriate academic; consider the contributions of this experience to your perceptions of yourself. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).		Levene's Test for Equality of Variances		<i>t</i> -test for Equality of Means					
		F	Sig.	<i>t</i>	Sig. 2-tailed	Mean Difference	Std. Error Difference	95% Confidence	
								Lower	Upper
I am more aware of what it is like to live and survive in a foreign country.	EVA	1.499	.232	2.002	.056	.559	.279	-.016	1.134
	EVNA			1.727	.115	.559	.324	-.162	1.218
I have changed in my understanding of cultural differences between my home and host country cultures.	EVA	.077	.784	-.273	.787	-.092	.337	-.787	.603
	EVNA			-.293	.774	-.092	.315	-.761	.577
I am more conscious of my personal bias towards my home country culture.	EVA	.003	.958	.847	.405	.401	.474	-.575	1.377
	EVNA			.795	.443	.401	.505	-.703	1.505
I learned about myself as a result of this expatriate experience.	EVA	.683	.416	-.361	.721	-.125	.346	-.838	.588
	EVNA			-.411	.686	-.125	.304	-.763	.513
I am more open to learning about new cultures.	EVA	.000	.985	.281	.781	.105	.375	-.667	.878
	EVNA			.274	.778	.105	.384	-.727	.938
I have not changed as a result of my experience as an academic expatriate.	EVA	.575	.455	1.265	.218	-.500	.395	-.314	1.314
	EVNA			1.274	.224	-.500	.392	-.345	1.345
Prior to this experience, I believe I was already significantly aware and sensitive to international cultural differences.	EVA	.025	.875	-.886	.569	-.197	.342	-.901	.507
	EVNA			-.998	.542	-.197	.317	-.870	.475

Note. EVA = Equal Variances Assumed. EVNA = Equal Variances Not Assumed.

Table 25

Independent Sample *t*-test Survey Question Nineteen

The following statements relate to your relationship with your home country while on assignment. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).		Levene's Test for Equality of Variances		<i>t</i> -test for Equality of Means					
		F	Sig.	<i>t</i>	Sig. 2-tailed	Mean Difference	Std. Error Difference	95% Confidence	
								Lower	Upper
I kept in touch with family and friends regularly while away.	EVA	.028	.869	-1.147	.262	-.342	.298	-.957	.272
	EVNA			-1.327	.200	-.342	.258	-.882	.198
I paid attention to the news from my home country while away.	EVA	.362	.553	-.203	.840	-.072	.356	-.805	.661
	EVNA			-.184	.857	-.072	.393	-.940	.795
I was in regular contact with my home country/institution via the telephone.	EVA	.017	.898	.070	.945	.046	.656	-1.304	1.396
	EVNA			.067	.948	.046	.688	-1.454	1.546
I was in regular contact with my home country/institution via e-mail and the Internet.	EVA	.004	.950	-.235	.816	-.138	.587	-1.348	1.072
	EVNA			-.239	.815	-.138	.578	-1.381	1.104
I was mostly concerned with the local happenings of my host culture.	EVA	1.572	.222	-1.885	.072	-.681	.361	-1.426	.064
	EVNA			-2.168	.043	-.681	.314	-1.337	-.024

Bar charts and histograms showing a graphical representation of survey instrument questions. Nominal data is represented by bar charts for questions 1-3 of part I and 2-4 of part II of the instrument. Ordinal data of Likert type scales are represented by histograms for questions 6-8, 17 and 19 of part II of the instrument. All bar charts and histograms are figures from an SPSS 17.0 output file.

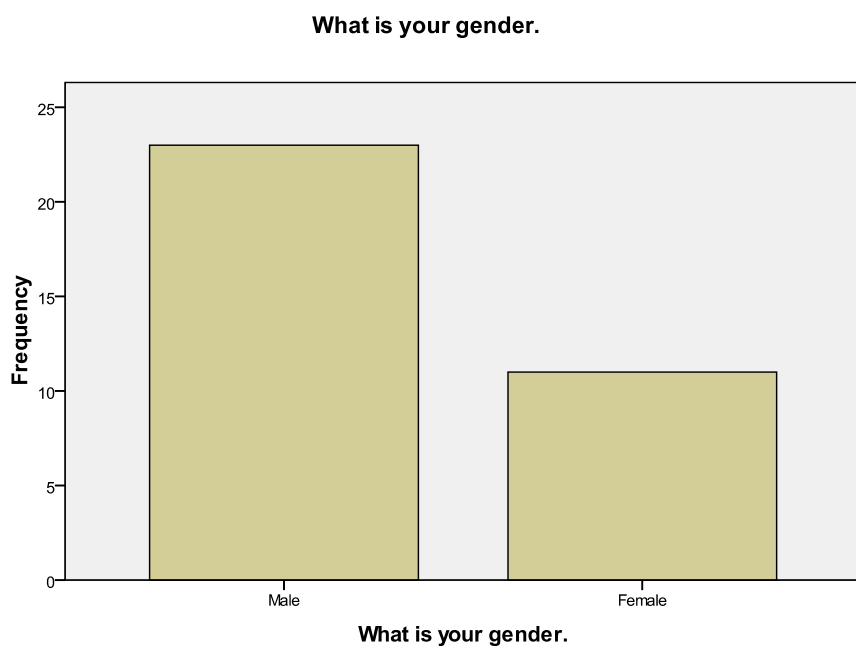


Figure 1. Gender.

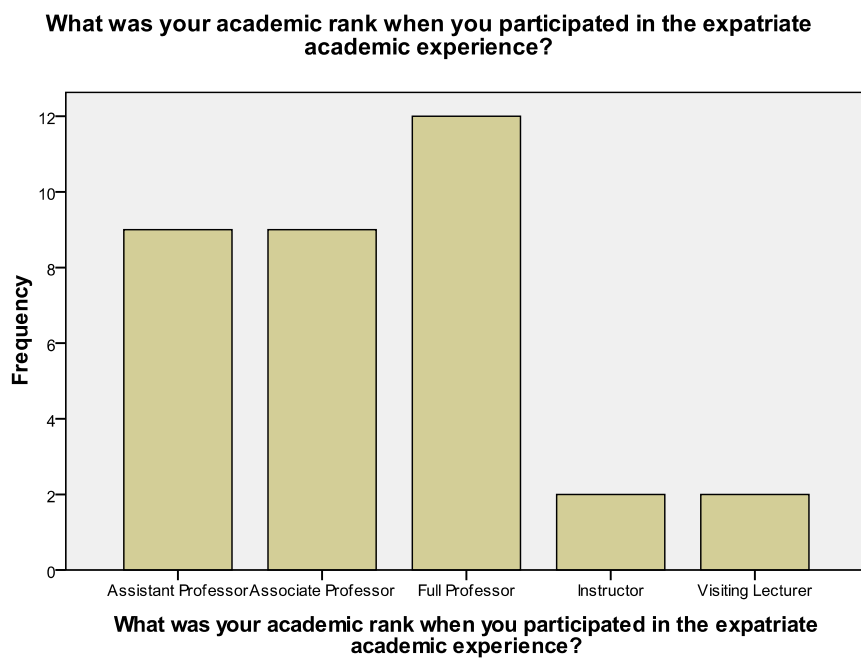


Figure 2. Academic Rank.



Figure 3. Age

2. How did you arrange this experience (i.e. did you apply for a particular opportunity)?

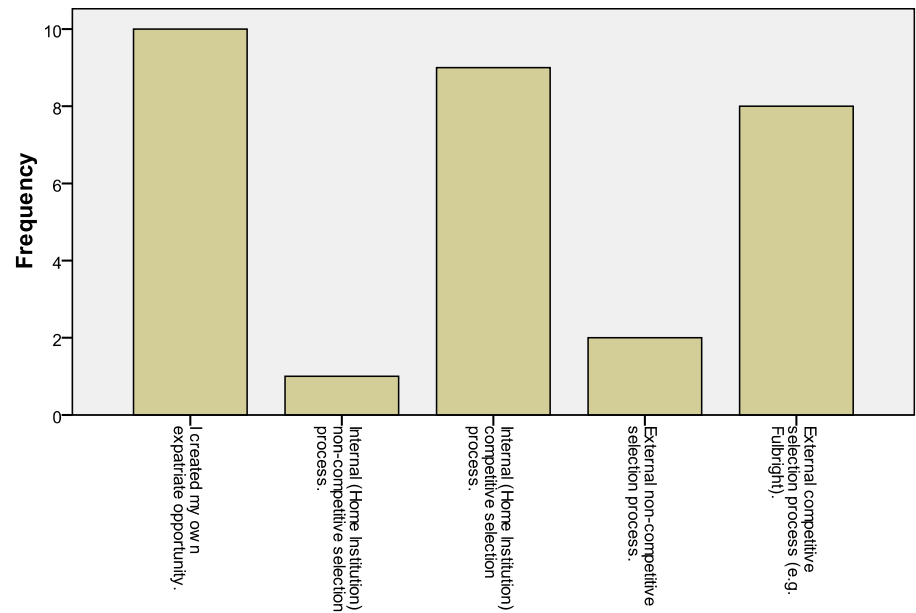


Figure 4. Arranging Expatriate Experience.

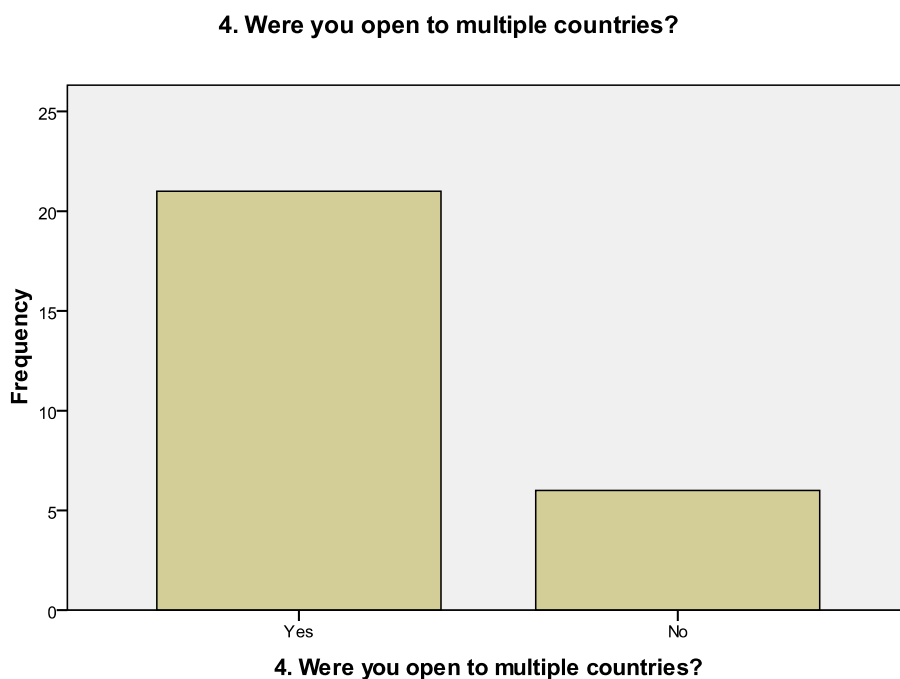


Figure 5. Multiple Country Openness.

6. Please rate the following statements regarding your perceptions of your most recent expatriate experience by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).-a. I completed all the objectives of the project successfully.

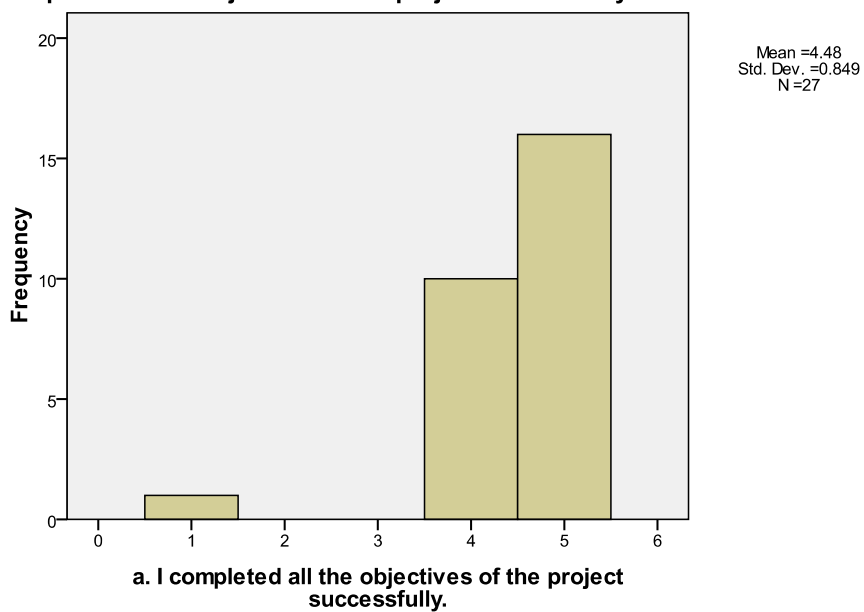


Figure 6. Self-Perceptions of Expatriate Experience 6-a.

6. Please rate the following statements regarding your perceptions of your most recent expatriate experience by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly)..b.I experienced considerable problems adjusting to the culture.

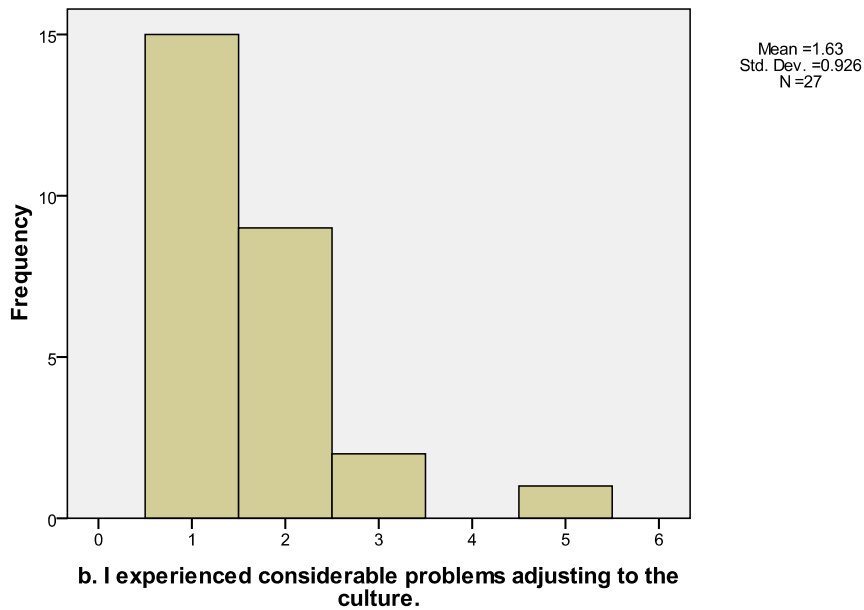


Figure 7. Self-Perceptions of Expatriate Experience 6-b.

6. Please rate the following statements regarding your perceptions of your most recent expatriate experience by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).

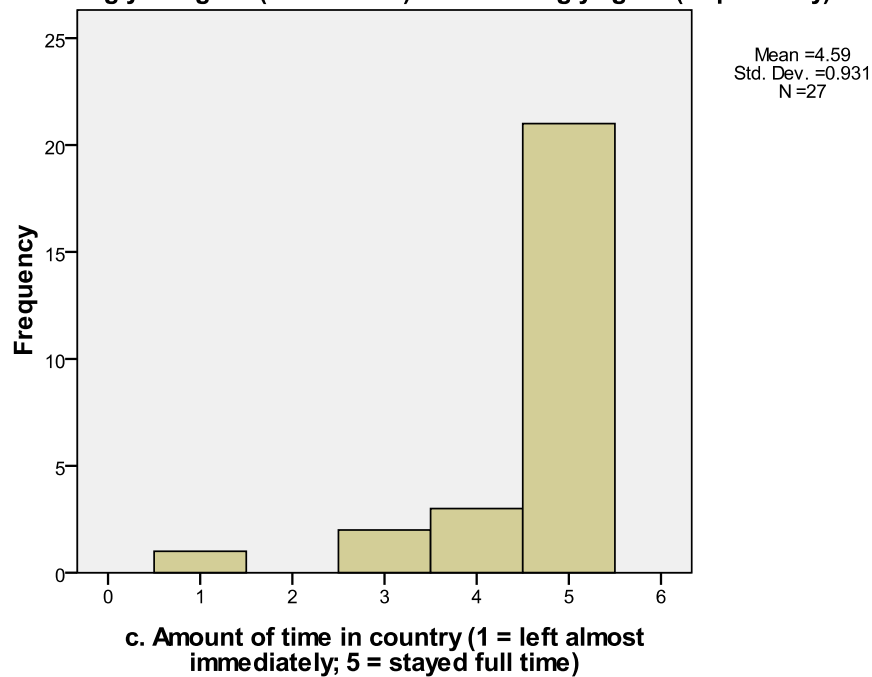


Figure 8. Self-Perceptions of Expatriate Experience 6-c.

6. Please rate the following statements regarding your perceptions of your most recent expatriate experience by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).-d. I was unprepared and did not't know what to expect.

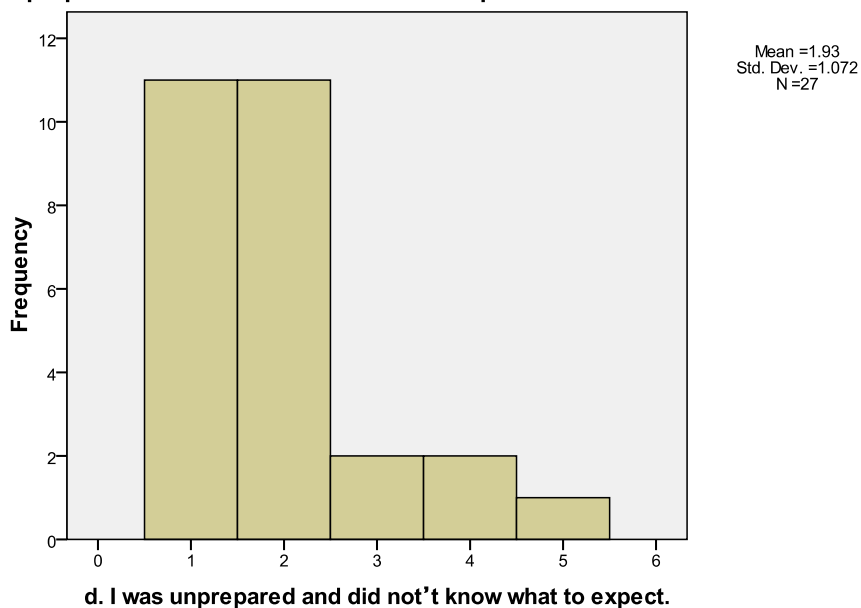


Figure 9. Self-Perceptions of Expatriate Experience 6-d.

6. Please rate the following statements regarding your perceptions of your most recent expatriate experience by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).e. My international colleagues were satisfied with my work.

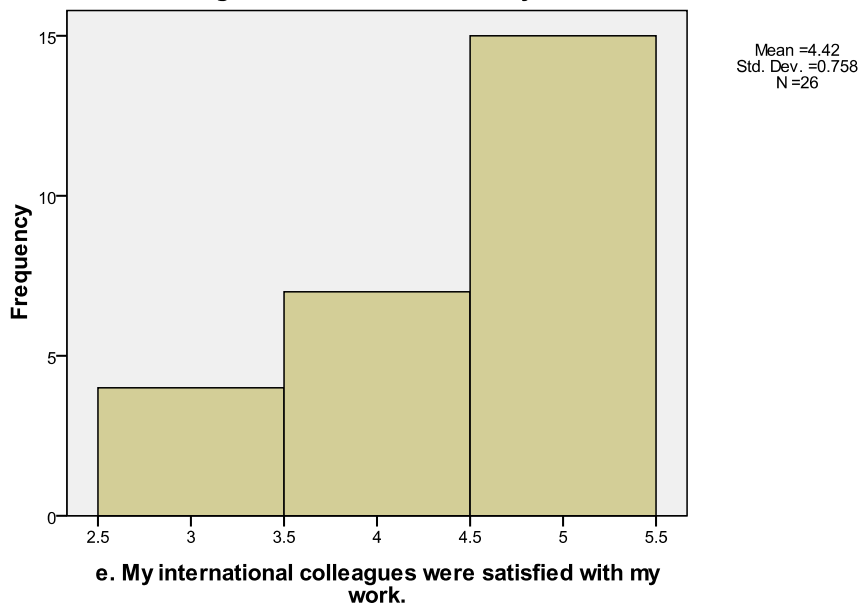


Figure 10. Self-Perceptions of Expatriate Experience 6-e.

6. Please rate the following statements regarding your perceptions of your most recent expatriate experience by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).-f. I felt the experience was beneficial to me as a person.

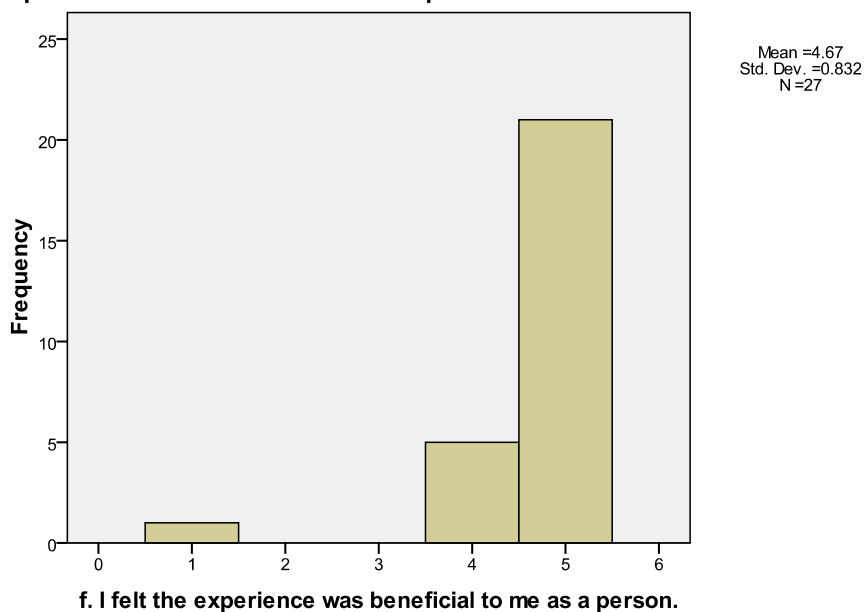


Figure 11. Self-Perceptions of Expatriate Experience 6-f.

6. Please rate the following statements regarding your perceptions of your most recent expatriate experience by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).g. I felt the experience did not provide me with adequate professional benefits.

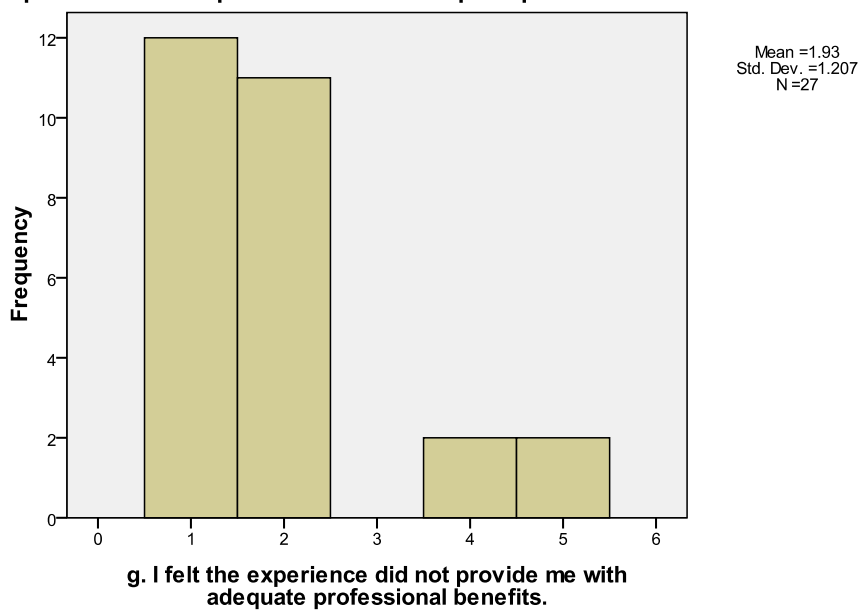


Figure 12. Self-Perceptions of Expatriate Experience 6-g.

6. Please rate the following statements regarding your perceptions of your most recent expatriate experience by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). h. This experience opened other opportunities for me.

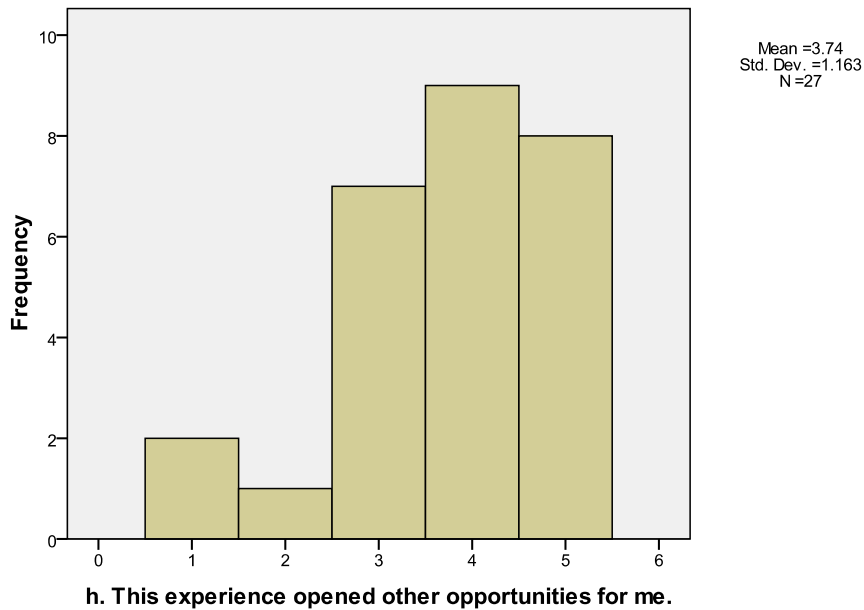


Figure 13. Self-Perceptions of Expatriate Experience 6-h.

6. Please rate the following statements regarding your perceptions of your most recent expatriate experience by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). i. Overall, the experience was difficult and unpleasant.

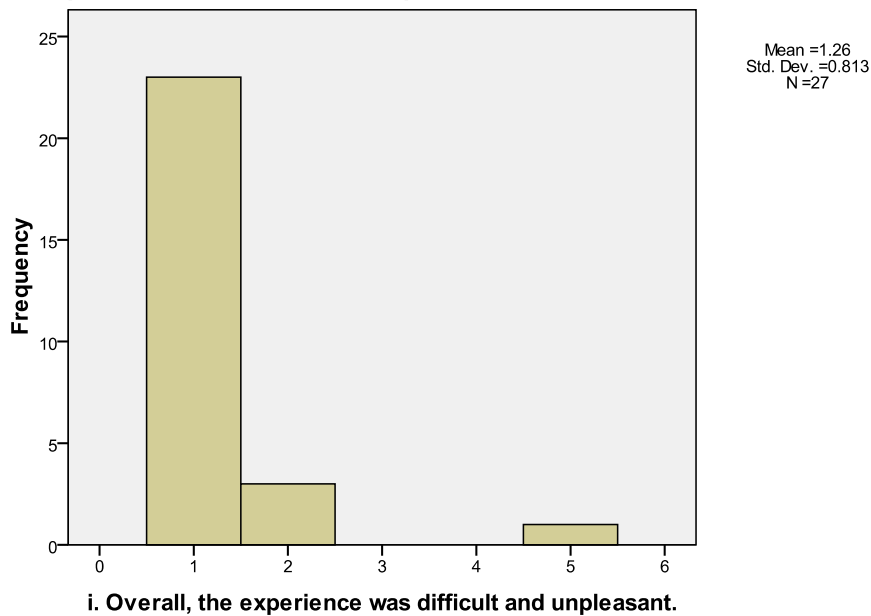


Figure 14. Self-Perceptions of Expatriate Experience 6-i.

7. Please rate the following items regarding your perceptions of how different the host culture was in comparison to your home country culture (scale 1 = not different at all; 5 = very different). -a. Living conditions (housing, bathrooms, and the like)

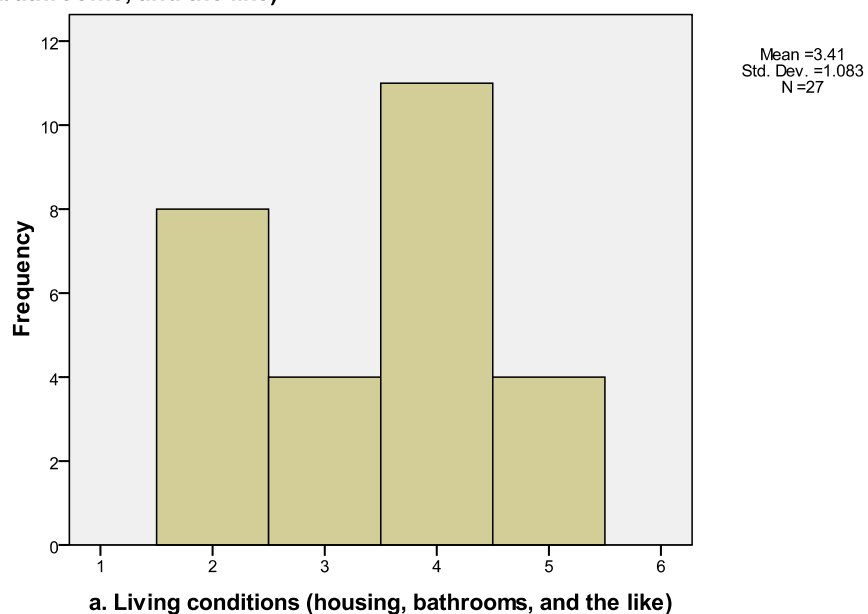


Figure 15. Living Conditions 7-a.

7. Please rate the following items regarding your perceptions of how different the host culture was in comparison to your home country culture (scale 1 = not different at all; 5 = very different). b. Shopping

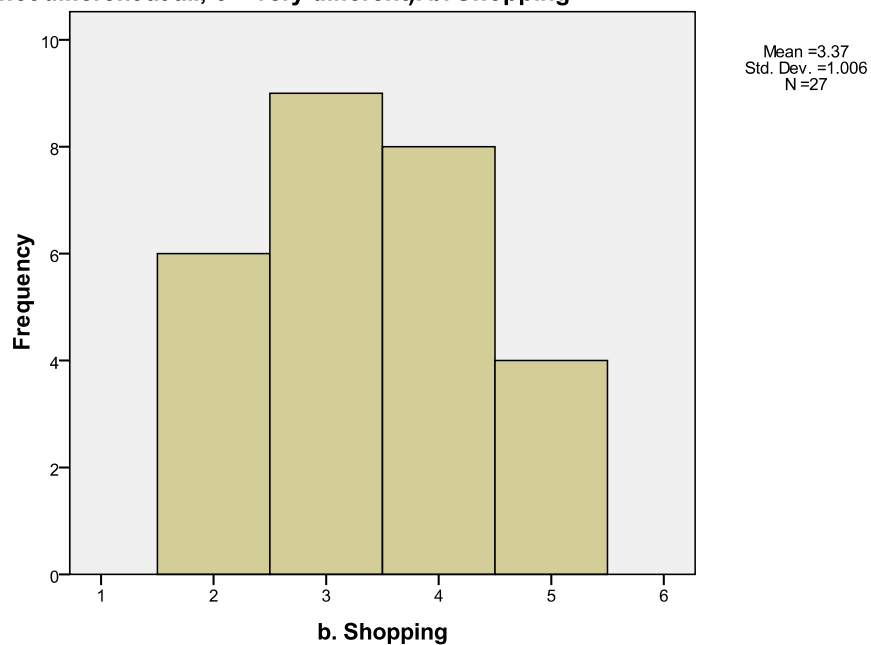


Figure 16. Living Conditions 7-b.

7. Please rate the following items regarding your perceptions of how different the host culture was in comparison to your home country culture (scale 1 = not different at all; 5 = very different). c. Food and Drink

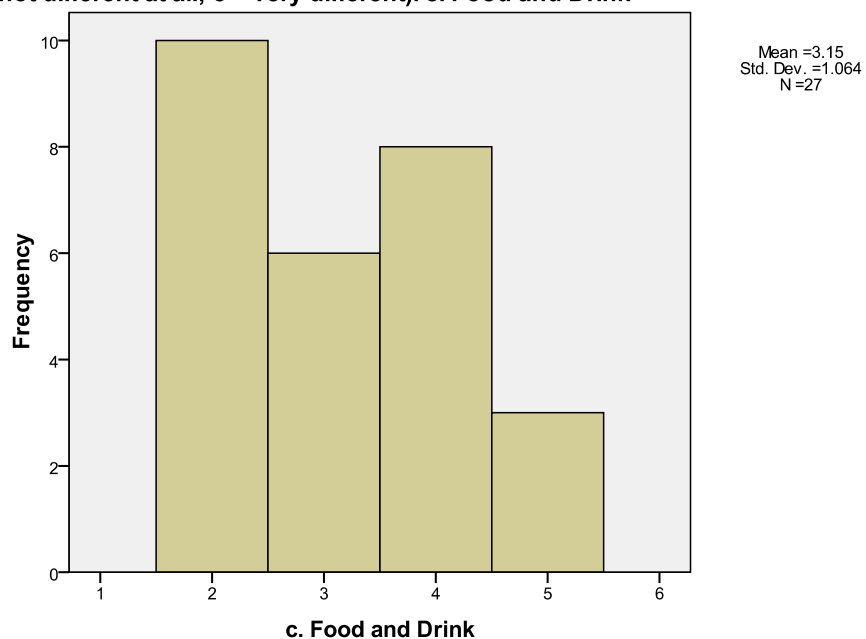


Figure 17. Living Conditions 7-c.

7. Please rate the following items regarding your perceptions of how different the host culture was in comparison to your home country culture (scale 1 = not different at all; 5 = very different). d. Language (i.e., verbal & written communication)

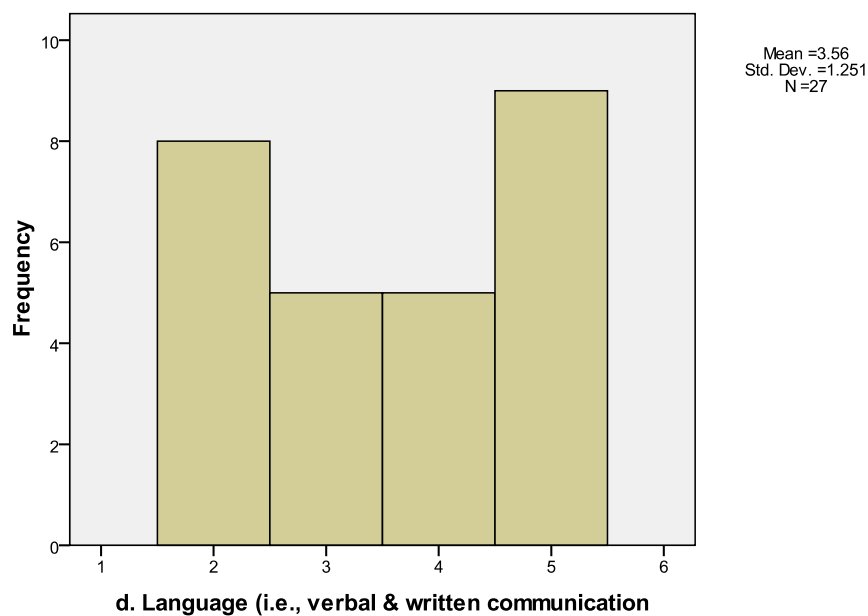


Figure 18. Living Conditions 7-d.

7. Please rate the following items regarding your perceptions of how different the host culture was in comparison to your home country culture (scale 1 = not different at all; 5 = very different). e. Transportation

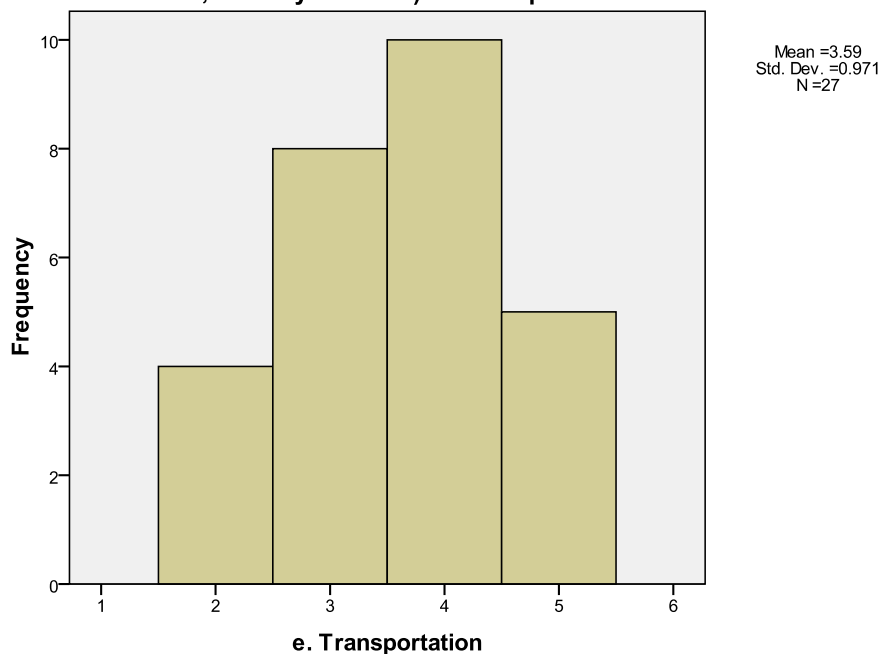


Figure 19. Living Conditions 7-e.

7. Please rate the following items regarding your perceptions of how different the host culture was in comparison to your home country culture (scale 1 = not different at all; 5 = very different). f. Communication Systems (Information Technology)

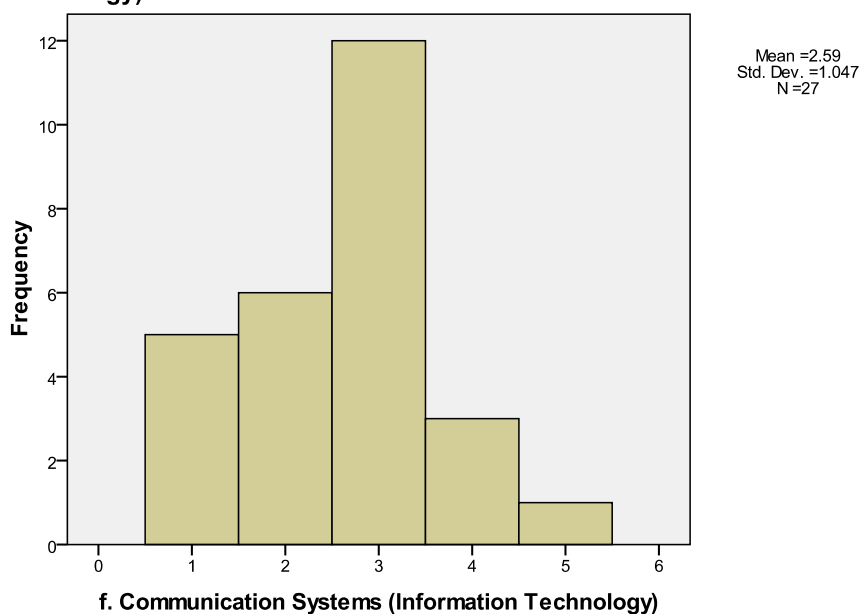


Figure 20. Living Conditions 7-f.

7. Please rate the following items regarding your perceptions of how different the host culture was in comparison to your home country culture (scale 1 = not different at all; 5 = very different). g. The daily "routine"

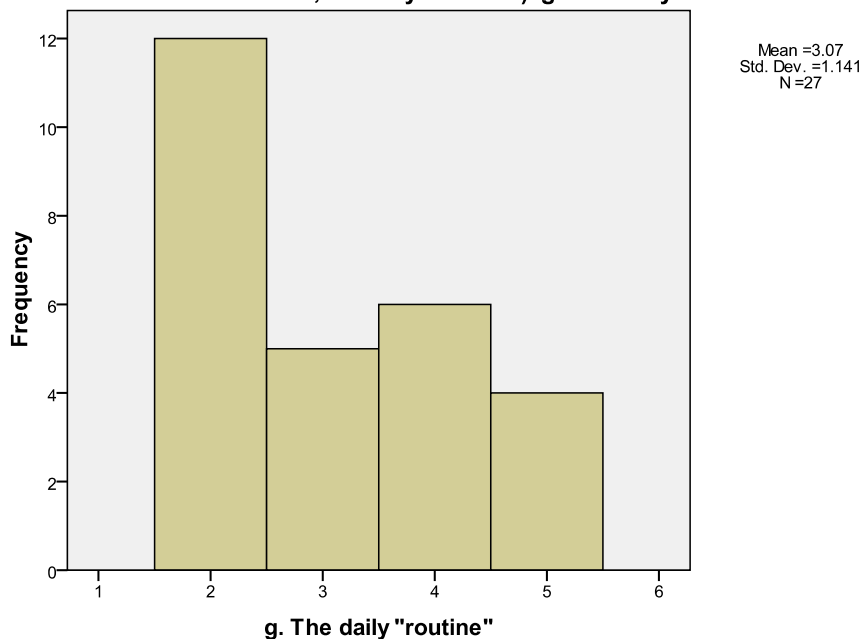


Figure 21. Living Conditions 7-g.

8. Please rate the following items regarding your perceptions of how different your host academic institution was in comparison to your home country institution (scale 1 = not different at all; 5 = very different). a. Language (i.e., verbal & written communication)

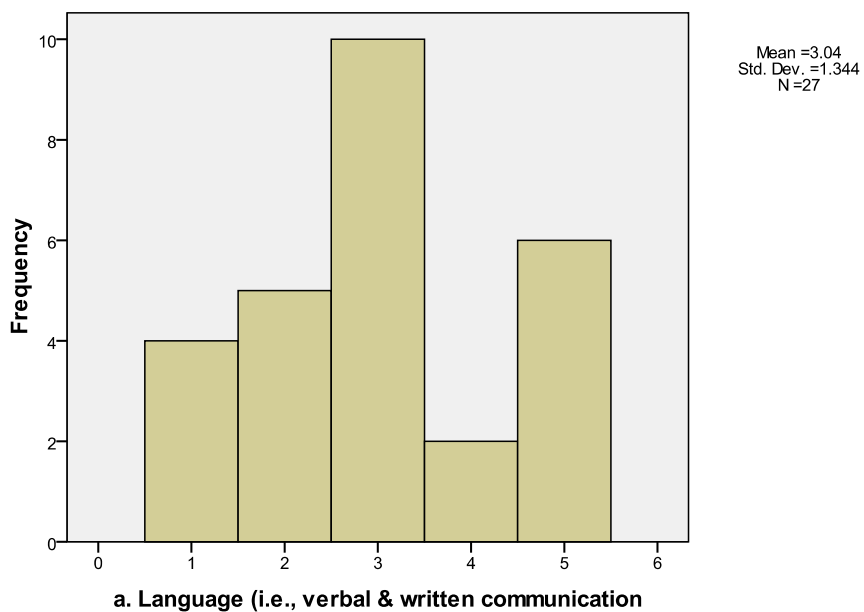


Figure 22. Home and Host Institution Differences 8-a.

8. Please rate the following items regarding your perceptions of how different your host academic institution was in comparison to your home country institution (scale 1 = not different at all; 5 = very different). b. Transportation

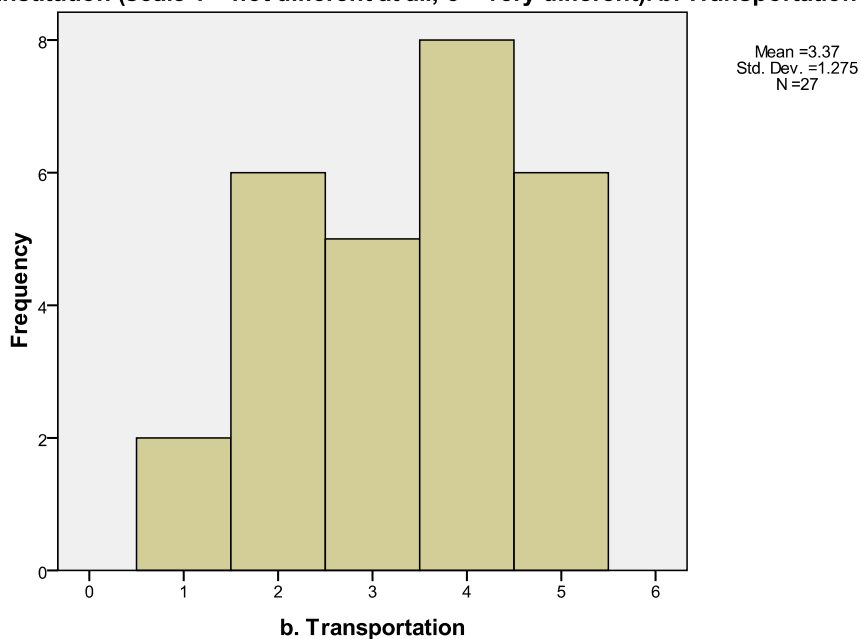


Figure 23. Home and Host Institution Differences 8-b.

8. Please rate the following items regarding your perceptions of how different your host academic institution was in comparison to your home country institution (scale 1 = not different at all; 5 = very different). c. The institution's instructional and research facilities

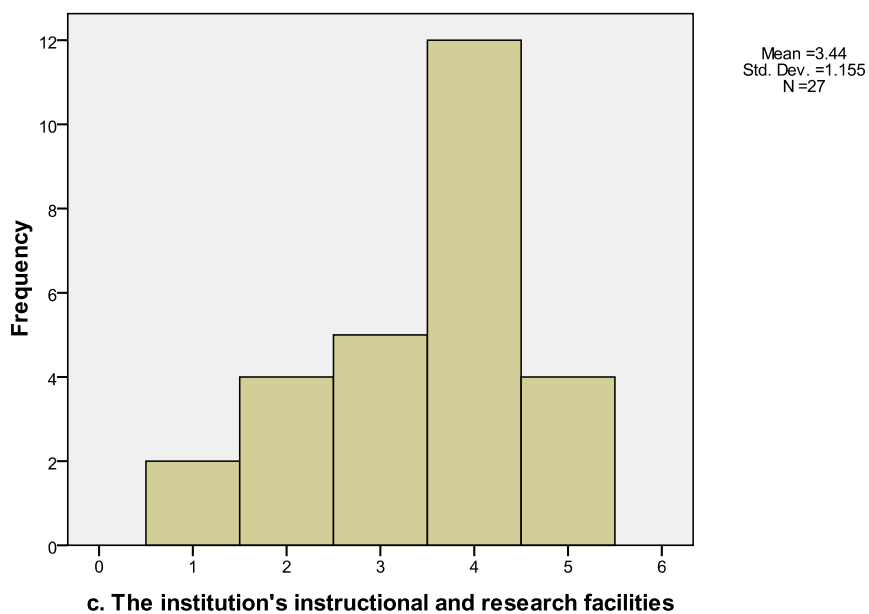


Figure 24. Home and Host Institution Differences 8-c.

8. Please rate the following items regarding your perceptions of how different your host academic institution was in comparison to your home country institution (scale 1 = not different at all; 5 = very different). d. Communication system (Information Technology)

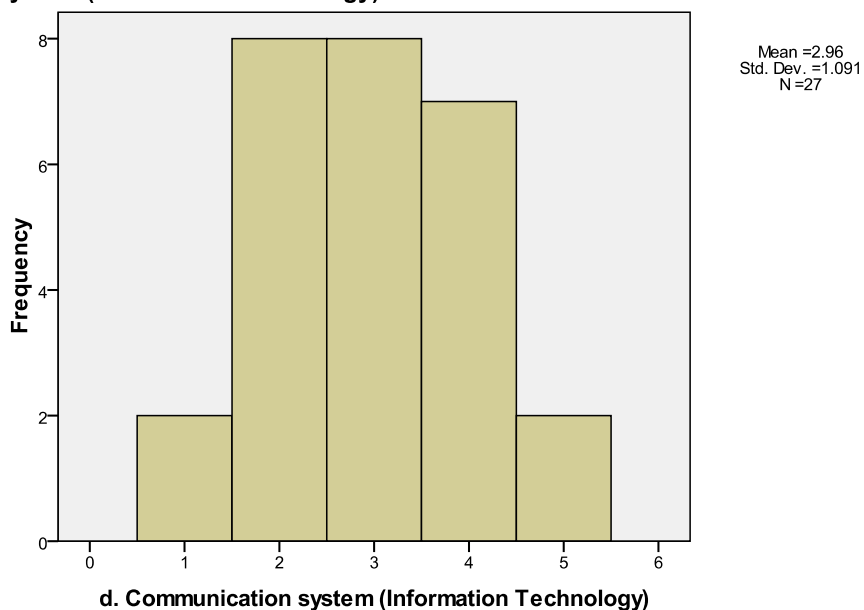


Figure 25. Home and Host Institution Differences 8-d.

17. The following statements relate to your self-identification as a result of your experience as an expatriate academic; consider the contributions of this experience to your perceptions of yourself. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). a. I am more aware of what it is like to live and survive in a foreign country.

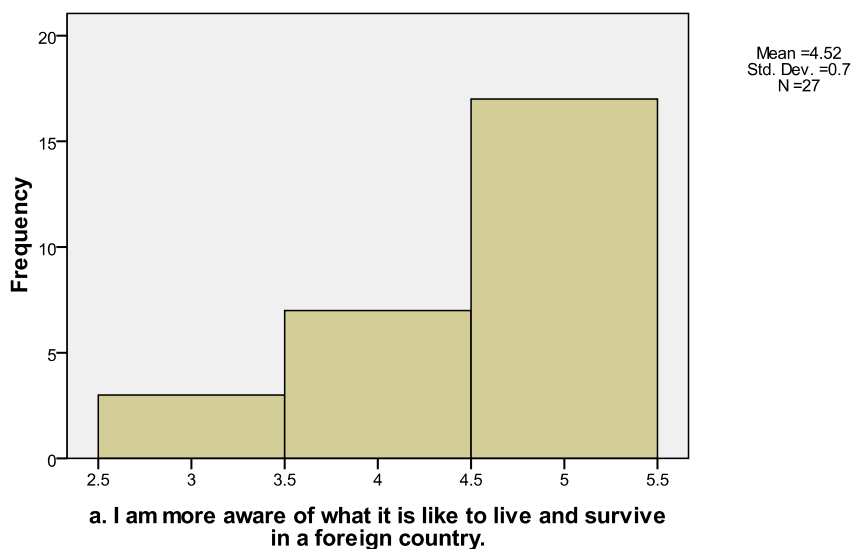


Figure 26. Cultural Awareness 17-a.

17. The following statements relate to your self-identification as a result of your experience as an expatriate academic; consider the contributions of this experience to your perceptions of yourself. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). b. I have changed in my understanding of cultural differences between my home and host country cultures.

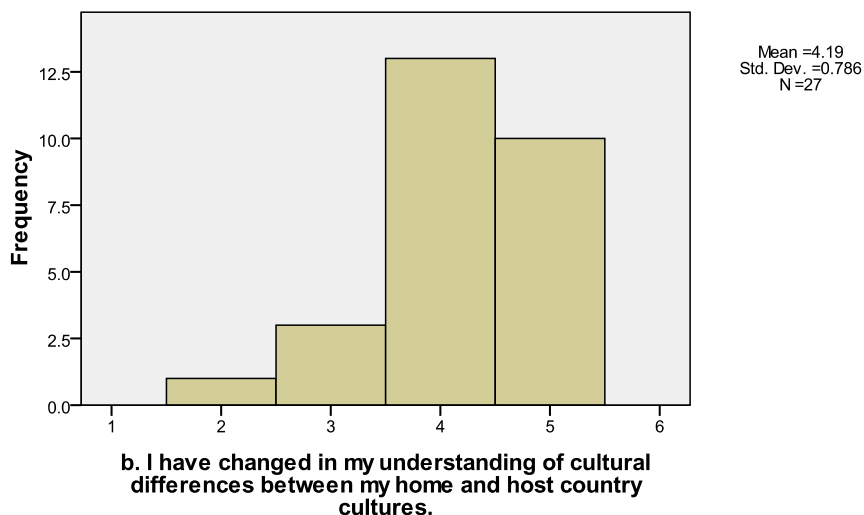


Figure 27. Cultural Awareness 17-b.

17. The following statements relate to your self-identification as a result of your experience as an expatriate academic; consider the contributions of this experience to your perceptions of yourself. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). c. I am more conscious of my personal bias towards my home country culture.

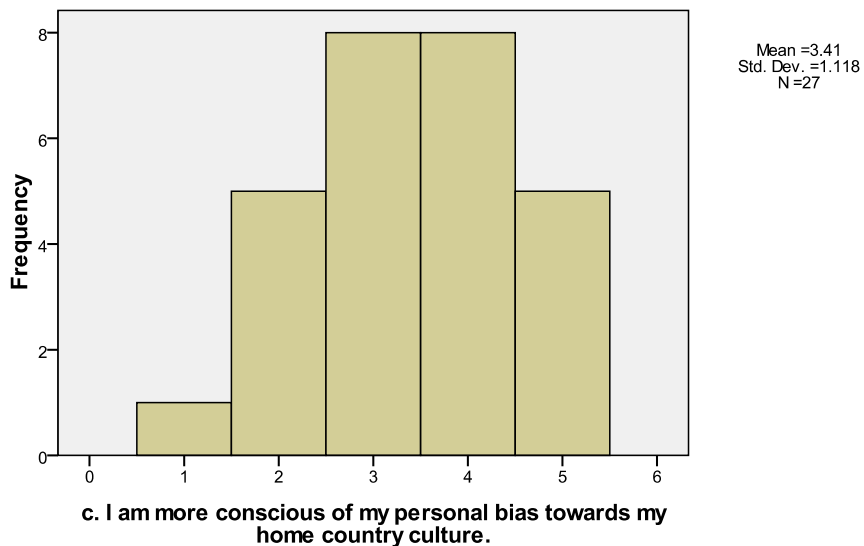


Figure 28. Cultural Awareness 17-c.

17. The following statements relate to your self-identification as a result of your experience as an expatriate academic; consider the contributions of this experience to your perceptions of yourself. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). d. I learned a lot about myself as a result of this expatriate experience.

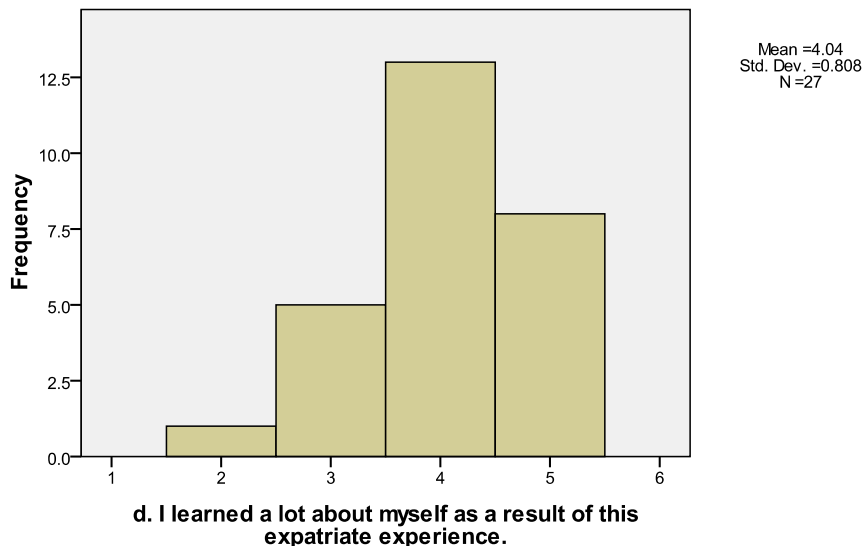


Figure 29. Cultural Awareness 17-d.

17. The following statements relate to your self-identification as a result of your experience as an expatriate academic; consider the contributions of this experience to your perceptions of yourself. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). e. I am more open to learning about new cultures.

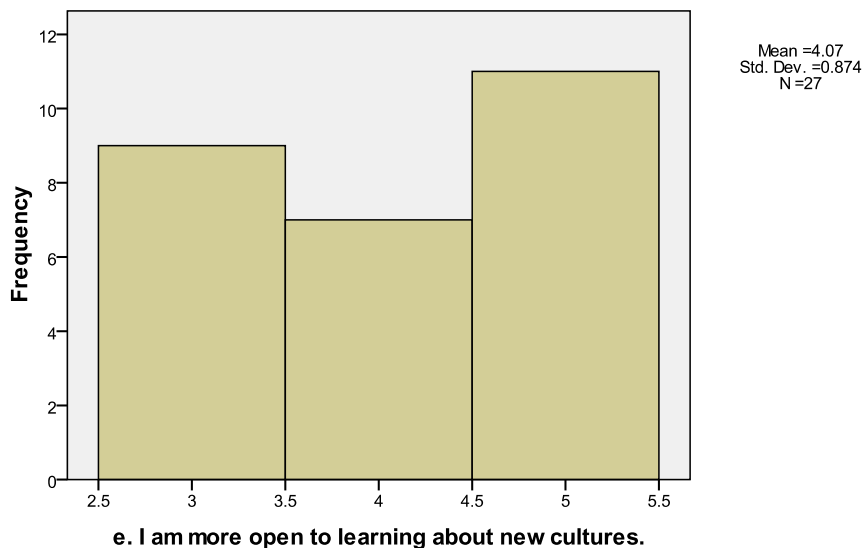


Figure 30. Cultural Awareness 17-e.

17. The following statements relate to your self-identification as a result of your experience as an expatriate academic; consider the contributions of this experience to your perceptions of yourself. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). f. I have not changed as a result of my experience as an academic expatriate.

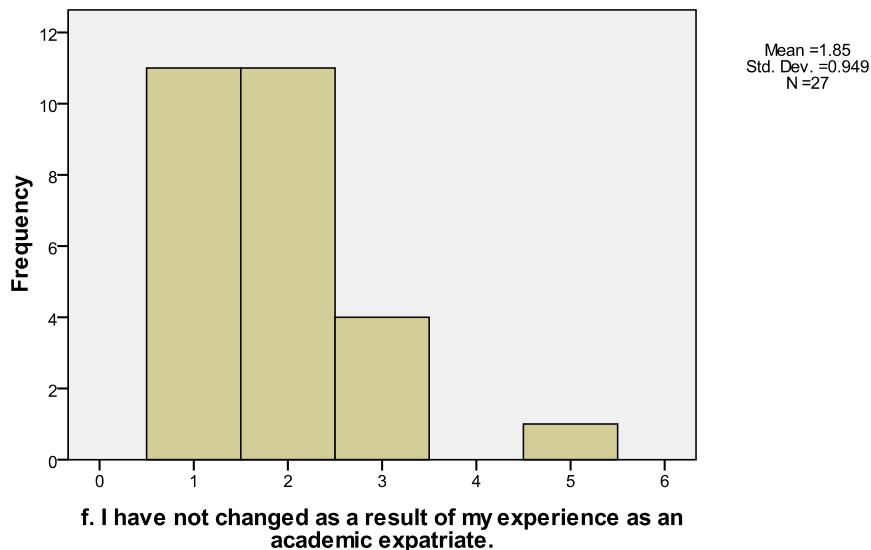


Figure 31. Cultural Awareness 17-f.

17. The following statements relate to your self-identification as a result of your experience as an expatriate academic; consider the contributions of this experience to your perceptions of yourself. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). g. Prior to this experience, I believe I was already significantly aware of and sensitive to international cultural differences.

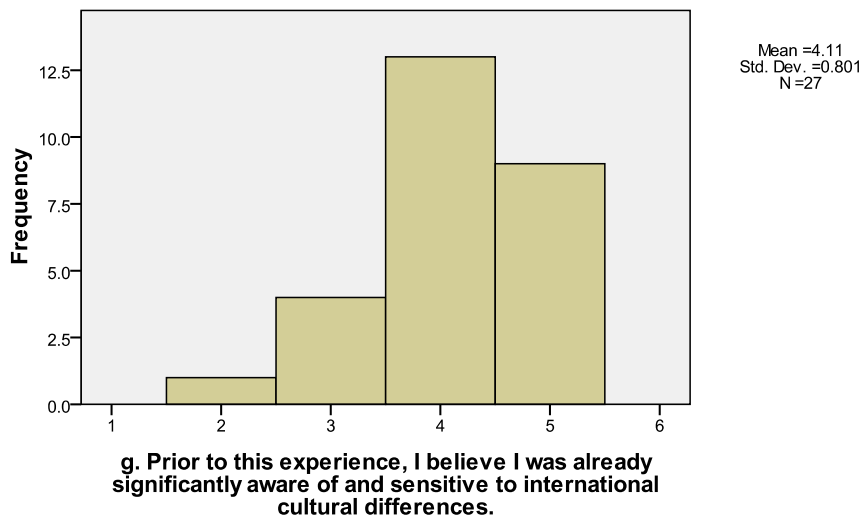


Figure 32. Cultural Awareness 17-g.

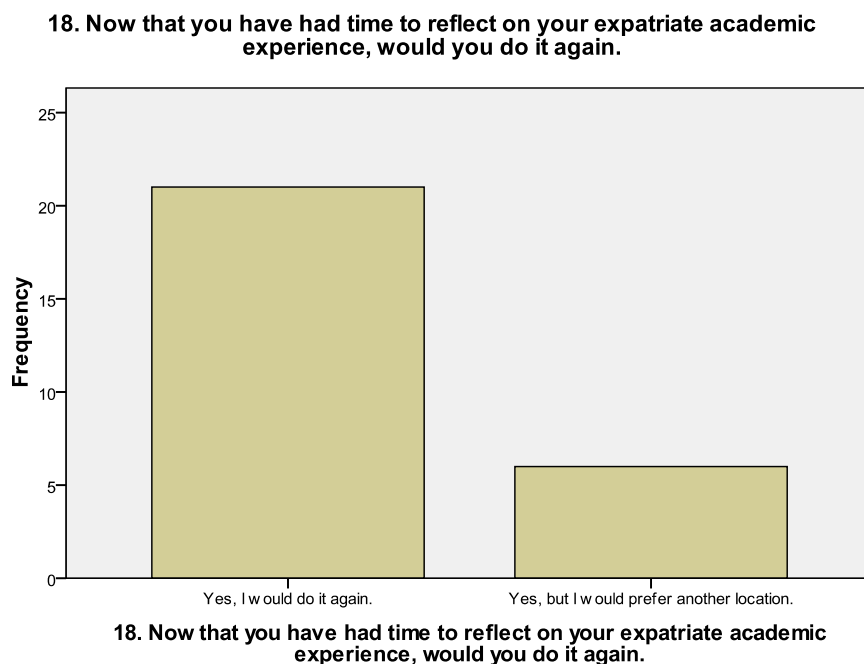


Figure 33. Would take on an Expatriate Assignment Again.

19. The following statements relate to your relationship with your home country while on assignment. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). a. I kept in touch with family and friends regularly while away.

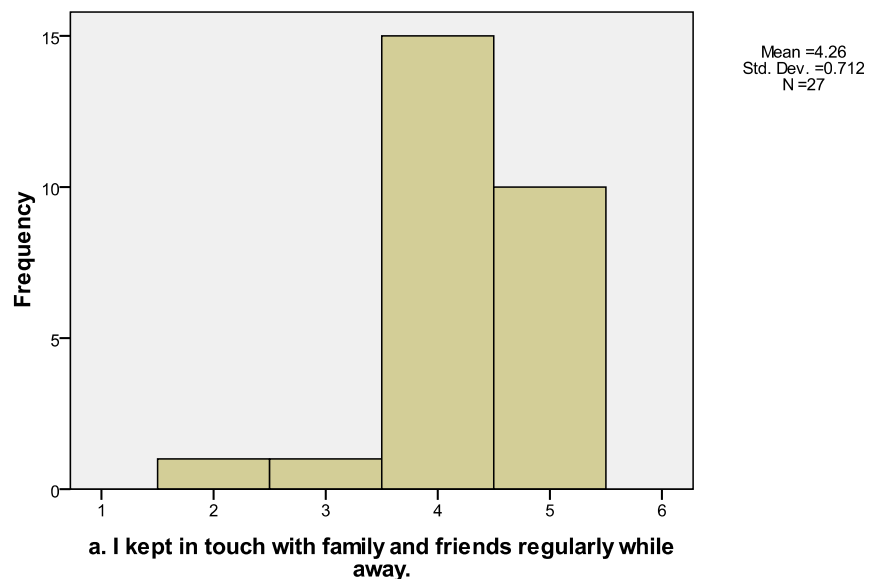


Figure 34. Interaction with Home Country while on Assignment 19-a.

19. The following statements relate to your relationship with your home country while on assignment. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). b. I paid attention to the news from my home country while away.

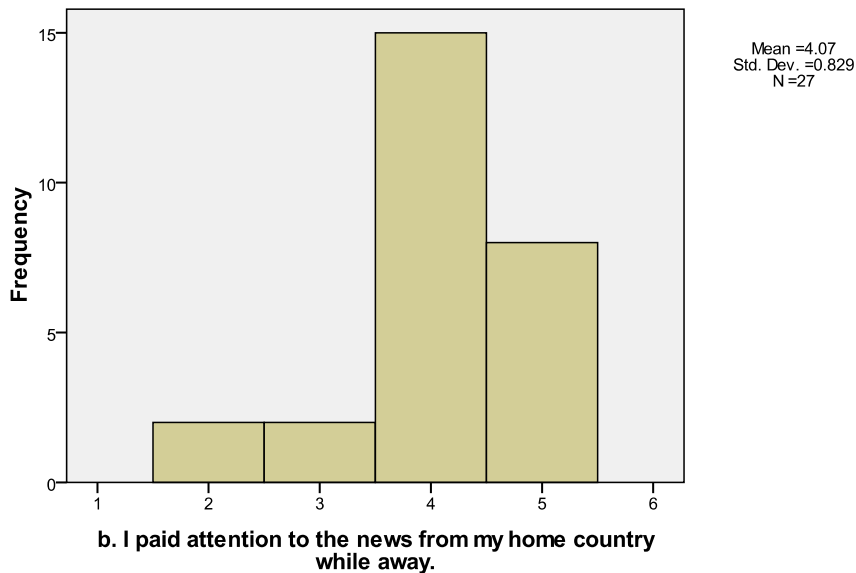


Figure 35. Interaction with Home Country while on Assignment 19-b.

19. The following statements relate to your relationship with your home country while on assignment. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). c. I was in regular contact with my home country/institution via the telephone.

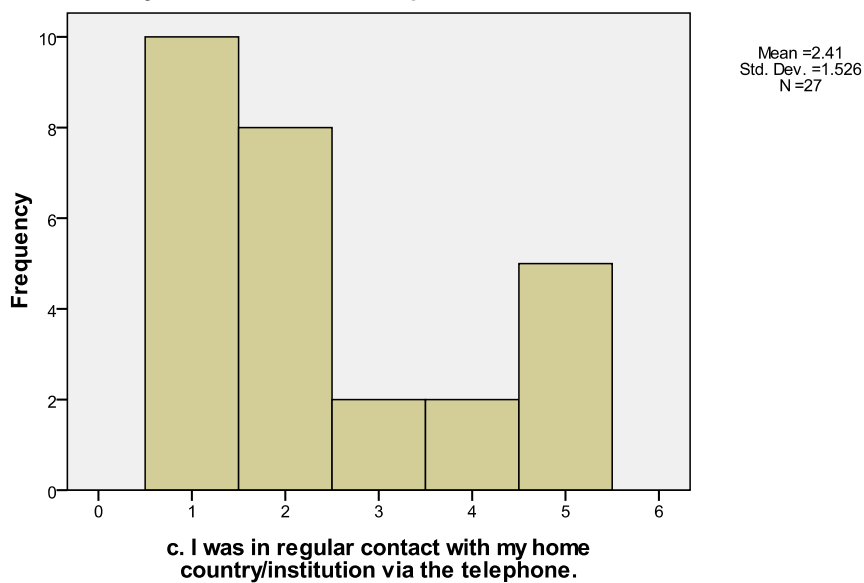


Figure 36. Interaction with Home Country while on Assignment 19-c.

19. The following statements relate to your relationship with your home country while on assignment. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). d. I was in regular contact with my home country/institution via e-mail and the Internet.

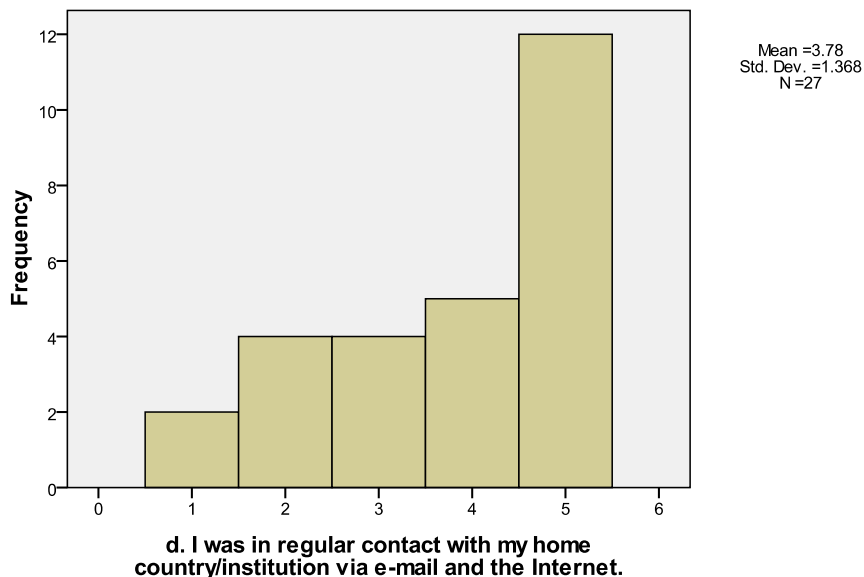


Figure 37. Interaction with Home Country while on Assignment 19-d.

19. The following statements relate to your relationship with your home country while on assignment. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly). e. I was mostly concerned with the local happenings of my host culture.

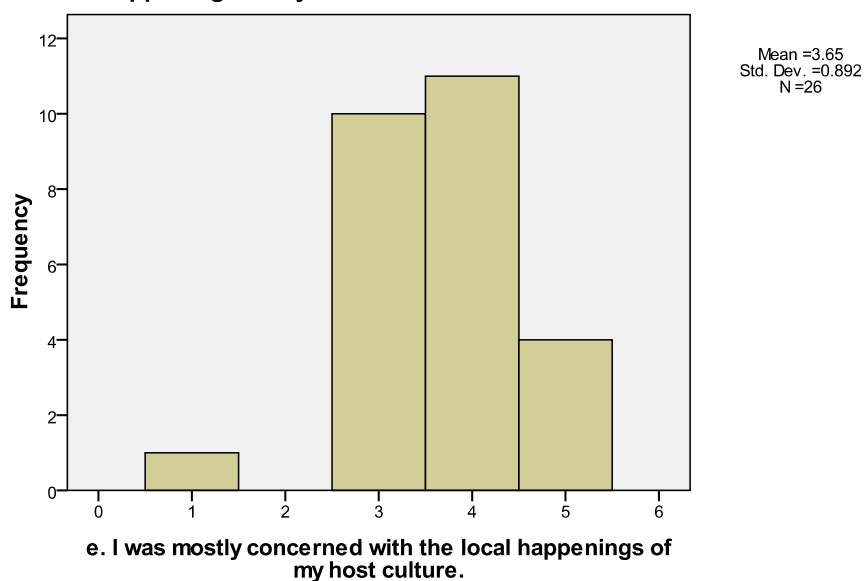


Figure 38. Interaction with Home Country while on Assignment 19-e.

APPENDIX B: SURVEY INSTRUMENT

ACADEMIC EXPATRIATE CULTURAL ADAPTATION QUESTIONNAIRE

Thank you for taking the time to complete this questionnaire. Your confidentiality is guaranteed by the rules governing the collection of data from human subjects. Any identifiers on this survey are solely for the purposes of improving response rate. Thank you.

Part I Directions: Please indicate your response by placing a check in the appropriate space.

1. Gender: Male _____ Female _____

2. What was your academic rank when you participated in the expatriate academic experience?

_____ Assistant Professor	_____ Instructor
_____ Associate Professor	_____ Visiting Lecturer
_____ Full Professor	
_____ Visiting Professor	

3. What was your age group at time of expatriate academic experience?

_____ 25 years old or less
 _____ 26 to 35 years old
 _____ 36 to 45 years old
 _____ 46 to 55 years old
 _____ 56 years or older

Part II Directions: Please read each question carefully and select the answer(s) that best matches your experience. Please consider your current or most recent expatriate experience in a foreign country.

1. Please list the country of your most recent expatriate academic experience.

2. How did you arrange this experience (i.e., did you apply for a particular opportunity)?

- ☐ I created my own expatriate opportunity.
- ☐ Internal (Home Institution) non-competitive selection process.
- ☐ Internal (Home Institution) Competitive selection process.
- ☐ External Non-competitive selection process.
- ☐ External Competitive selection process (e.g., Fulbright).

3. Why did you decide to participate in an expatriate academic opportunity? Select all that apply and if 'other' please explain.

- ☐ In general, faculty are encouraged by my institution to have international experiences.
- ☐ I was personally encouraged to do so by my employer.
- ☐ In general, our students are encouraged to have international experiences and I wanted to be supportive.
- ☐ The opportunity just came up.
- ☐ I thought it would be good for my career.
- ☐ Other (Please explain)

4. Were you open to multiple countries?

- ☐ Yes.
- ☐ No.

5. What did you do during this expatriate experience (Please check all that apply)?

- ☐ Teaching
- ☐ Administration
- ☐ Non-academic professional position
- ☐ Conducted research
- ☐ Student
- ☐ Personal professional development
- ☐ Other (Please explain)

6. Please rate the following statements regarding your perceptions of your most recent expatriate experience by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).

- | | | | | | |
|--|---|---|---|---|---|
| a. I completed all the objectives of the project successfully. | 1 | 2 | 3 | 4 | 5 |
| b. I experienced considerable problems adjusting to the culture. | 1 | 2 | 3 | 4 | 5 |
| c. Amount of time in country (1 = left almost immediately; 5 = stayed full time) | | | | | |
| | 1 | 2 | 3 | 4 | 5 |
| d. I was unprepared and didn't know what to expect. | 1 | 2 | 3 | 4 | 5 |
| e. My international colleagues were satisfied with my work. | 1 | 2 | 3 | 4 | 5 |
| f. I felt the experience was beneficial to me as a person. | 1 | 2 | 3 | 4 | 5 |
| g. I felt the experience did not provide me with adequate professional benefits. | | | | | |
| | 1 | 2 | 3 | 4 | 5 |
| h. This experience opened other opportunities for me. | 1 | 2 | 3 | 4 | 5 |
| i. Overall, the experience was difficult and unpleasant. | 1 | 2 | 3 | 4 | 5 |

7. Please rate the following items regarding your perceptions of how different the host culture was in comparison to your home country culture (scale 1 = not different at all; 5 = very different).

- | | | | | | |
|---|---|---|---|---|---|
| a. Living conditions (housing, bathrooms, and the like) | 1 | 2 | 3 | 4 | 5 |
| b. Shopping | 1 | 2 | 3 | 4 | 5 |
| c. Food and drink | 1 | 2 | 3 | 4 | 5 |
| d. Language (i.e., verbal & written communication) | 1 | 2 | 3 | 4 | 5 |
| e. Transportation | 1 | 2 | 3 | 4 | 5 |
| f. Communication System (IT) | 1 | 2 | 3 | 4 | 5 |
| g. The daily "routine" | 1 | 2 | 3 | 4 | 5 |

8. Please rate the following items regarding your perceptions of how different your host academic institution was in comparison to your home country institution (scale 1 = not different at all; 5 = very different).

- | | | | | | |
|--|---|---|---|---|---|
| a. Language (i.e., verbal & written communication) | 1 | 2 | 3 | 4 | 5 |
| b. Transportation | 1 | 2 | 3 | 4 | 5 |
| c. The Institution's instructional and research facilities | 1 | 2 | 3 | 4 | 5 |
| d. Communication System (IT) | 1 | 2 | 3 | 4 | 5 |

9. What were the positive features of your expatriate experience? Select all that would apply. If 'other' please explain.

☐ Meeting new people.
☐ Exploring new countries.
☐ Learning about a new culture.
☐ The opportunity to travel to other regional countries.
☐ The work experienced gained as a result.
☐ Other. (Please explain)

10. What were the negative features of your expatriate experience? Select as many as you would like. If 'other' please explain.

☐ Language barriers.
☐ Cultural barriers.
☐ Dealing with host country nationals.
☐ Getting around.
☐ Adjusting without having loved ones nearby (if applicable).
☐ I have no negative feelings about my experience.
☐ Other. (Please explain)

11. Which of the following best describes your living arrangements while on your expatriate experience?

☐ I lived in housing provided by the host institution.
☐ I had my own apartment or house to live in.
☐ I stayed with a host family.
☐ I lived in a hotel type of environment.

12. The questions below relate to family or significant others who may have traveled with you or were in the host culture. If you traveled alone or if your expatriate assignment did not include a traveling partner/family, please note below in option (d) and move onto the question 15.

- a. ☐ Yes, spouse/significant other. (Go to question 13)
b. ☐ Yes, spouse/significant other and one or more children. (Go to question 13)
c. ☐ Yes, child/children only. No spouse/significant other. (Go to question 14)
d. ☐ No, I was by myself. (Go to question 15)

13. If a spouse/significant other and/or children traveled with you, please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).

- a. My spouse/significant other easily adapted to the host country cultural environment.

1 2 3 4 5

- b. My spouse/significant other were able to meet new people and make friends from the host culture.

1 2 3 4 5

- c. It was difficult to make new friends from the host country for my spouse/significant other.

1 2 3 4 5

- d. Language differences were easy to overcome for my spouse/significant other.

1 2 3 4 5

- e. While in the foreign country, my spouse's/sig. other's health was good.

1 2 3 4 5

14. If a spouse/significant other and/or children traveled with you, please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).

- a. My child/children were able to easily adapt to the host country cultural environment.

1 2 3 4 5

- b. My child/children was/were able to meet new people and make friends from the host culture.

1 2 3 4 5

- c. It was difficult for my child/children to make new friends from the host culture.

1 2 3 4 5

- d. Language differences were easy to overcome for my child/children.

1 2 3 4 5

- f. While in the foreign country, my child's/children's health was good.

1 2 3 4 5

15. Did any of the following events occur while you were participating in the expatriate experience (check all that apply).

_____ Major illness in immediate family

_____ Birth of a child (yours)

_____ Death in the family

_____ Financial crisis

_____ Other

16. Were family issues instrumental in compelling you to return earlier than expected?

_____ Yes _____ No

17. The following statements relate to your self-identification as a result of your experience as an expatriate academic; consider the contributions of this experience to your perceptions of yourself. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).

- a. I am more aware of what it is like to live and survive in a foreign country.

1 2 3 4 5

- b. I have changed in my understanding of cultural differences between my home and host country cultures.

1 2 3 4 5

- c. I am more conscious of my personal bias towards my home country culture.

1 2 3 4 5

- d. I learned a lot about myself as a result of this expatriate experience.

1 2 3 4 5

- e. I am more open to learning about new cultures.

1 2 3 4 5

- f. I have not changed as a result of my experience as an academic expatriate.

1 2 3 4 5

- g. Prior to this experience, I believe I was already significantly aware of and sensitive to international cultural differences.

1 2 3 4 5

18. Now that you have had time to reflect on your expatriate academic experience, would you do it again if you had the opportunity?

_____ Yes, I would do it again.

_____ Yes, but I would prefer another location.

_____ No, I do not plan on another expatriate academic experience.

19. The following statements relate to your relationship with your home country while on assignment. Please indicate your response to the following statements by circling the response using the scale 1 = strongly disagree (or not at all) to 5 = strongly agree (or perfectly).

a. I kept in touch with family and friends regularly while away.

1 2 3 4 5

b. I paid attention to the news from my home country while away.

1 2 3 4 5

c. I was in regular contact with my home country/institution via the telephone.

1 2 3 4 5

d. I was in regular contact with my home country/institution via e-mail and the Internet.

1 2 3 4 5

e. I was mostly concerned with the local happenings of my host culture.

1 2 3 4 5

20. Upon your return home, which of the following best describes your feelings? Select all that apply.

_____ It was good to finally be home.

_____ I miss being on my expatriate academic experience.

_____ I wish I had never left home.

_____ It seems like I have been gone forever.

_____ It seems like I just left home.

_____ I feel sad that my time in the host country is over.

_____ I am relieved that my time in the host country is over.

_____ I feel that I have to reacclimatize myself.

_____ Other

--

21. How did you prepare for this expatriate experience (i.e., prior to leaving). Please check all that apply.

- ☐ I read about the country and the institution I would be visiting.
- ☐ I spoke with others who had been to this country before.
- ☐ I spoke to individuals “native” to this country.
- ☐ I taught myself some of the language (e.g., listened to audio tape).
- ☐ I completed a language course.
- ☐ I attended a cultural awareness course designed for this experience.
- ☐ My family and I attended a cultural awareness course designed for this experience.
- ☐ Other

22. Is there anything additional you would like to tell the researcher about your experiences? Please offer as many details as your wish.

APPENDIX C: ADMINISTRATOR INFORMAL BACKGROUND QUESTIONS

Dear Chancellor, Provost, International Education Director, or Department Chair (Specific names and titles will be noted.)

My name is Mark Fenton and I am an Assistant Professor of International Business and Management at the University of Wisconsin-Stout. I am currently working on my doctoral dissertation researching what factors lead to a positive expatriate academic experience and what if any training needs are identified to lead to a more productive and positive experience for academic expatriates.

This research design makes it necessary to get background information from administrators addressing their respective universities' expectations regarding faculty who have previous or are considering an expatriate academic experience. Your time is appreciated and your anonymity is guaranteed by the rules governing the collection of data from human subjects.

For those in business and industry, a key career stepping stone is accepting an expatriate assignment. Keeping that in mind, please think about the faculty at your university as you review and answer the questions below.

1. Does your university encourage and support faculty taking the opportunity to teach in foreign countries for short or longer time periods (Including several weeks, summer, semester, academic year or longer.)?
2. Are there available financial resources to fund expatriate academic experiences at the university? How do faculty members learn about financial resources on or off campus to fund an international experience?
3. Would the fact that a faculty member had taken on a previous expatriate experience have an impact on promotion and/or tenure? Why or why not?
4. Are there any implicit or explicit factors that would cause a faculty member to think an expatriate academic experience would benefit their career? What are they?

APPENDIX D: INTRODUCTORY LETTER TO RESPONDENTS

Dear Dr. (name),

The research questionnaire is directly related to your experiences as an academic who has traveled and worked in another country. The common term applied to these professionals is expatriate academic and you will see the term expatriate throughout the instrument. Each question offers you several choices for your answer. There is also a demographic questionnaire that is used for classification purposes.

The main body of the instrument addresses the six questions of this research. The main questions are written in full so that you know the topic you are generally addressing. The last question asks if you have any additional comments. I would like to invite you to address any information that might have been missed, which you think is appropriate for this research. Keep in mind this is about your perceptions of how you were able to adapt to the host country culture.

These questions pertain primarily to the cultural adaptation you and, if appropriate, your traveling partner(s) went through as you prepared for or continued during your expatriate experience. The data will be used to add to the body of knowledge addressing expatriate academics cultural adaptation experiences as this is an area with little applied or empirical research. Your participation is appreciated and your identity is guaranteed to be kept confidential by the rules governing the collection of data from human subjects. Also, your participation is voluntary and you may end your participation at any time. If you have any questions, please contact the researcher at 715-232-5268 or via e-mail at fentonm@uwstout.edu. Your time and efforts are greatly appreciated.

Thank you.

Researcher:

Mark Fenton

Doctoral Candidate: Indiana State University

Assistant Professor of Management and International Business: UW-Stout

Research Advisor:

Dr. Tad Foster

College of Technology

Indiana State University

APPENDIX E: INVITATION AND INFORMED CONSENT

A CURRENT STATUS STUDY OF SELECTION, TRAINING, AND HOST COUNTRY CULTURAL ADAPTATION EXPERIENCES OF EXPATRIATE FACULTY FROM UNITED STATES AACSB UNIVERSITIES

Dear Dr. (Names added to separate invitations to participate.)

I am following up to ask you to participate in a research project for my doctoral dissertation addressing the experiences of academic professionals who have lived and taught in a foreign country.

The research questionnaire is directly related to your experiences as an academic who has traveled and worked in another country. The common term applied to these professionals is expatriate academic and you will see the term expatriate throughout the instrument. Each question offers you several choices for your answer. A brief set of demographic questions is also included. The survey should take 10-15 minutes to complete.

Areas in the survey instrument also include options to offer additional content. I would like to invite you to address any information that might have been missed, which you think is appropriate for this research.

These questions pertain primarily to the cultural adaptation you and, if appropriate, your traveling partner(s) went through as you prepared for or continued during your expatriate experience. The data will be used to add to the body of knowledge addressing expatriate academics cultural adaptation experiences as this is an area with little applied or empirical research. Your participation is appreciated and your identity is guaranteed to be kept confidential by the rules governing the collection of data from human subjects. Also, your participation is voluntary and you may end your participation at any time. If you have any questions, please contact the researcher at 715-232-5268 or via e-mail at fentonm@uwstout.edu.

Your participation in this study is voluntary. By completing and you are voluntarily agreeing to participate. You are free to decline to answer any particular question you do not wish to answer for any reason.

Below you will find the survey link in the online survey program called Qualtrics. Your time and efforts are greatly appreciated.

http://uwstout.qualtrics.com/SE?SID=SV_3QQy5DGTdky50VK&SVID=Prod

If you have any questions about the study, please contact:

Researcher:

Mark Fenton

Doctoral Candidate: Indiana State University

Assistant Professor of Management and International Business: UW-Stout

Office: 715-232-5268

Research Advisor:

Dr. Tad Foster

College of Technology

Indiana State University

Office: 812-237-3166

E-mail: Tad.Foster.indstate.edu

If you have any questions about your rights as a research subject or if you feel you've been placed at risk, you may contact the Indiana State University Institutional Review Board (IRB) by mail at Indiana State University, Office of Sponsored Programs, Terre Haute, IN, 47809, by phone at (812) 237-8217, or by e-mail at irb@indstate.edu.

Thank you,

Mark Fenton

