

## **BUSINESS PROGRAM STUDY ABROAD INCIDENTS: LESSONS LEARNED THE HARD WAY**

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*A study abroad site director and an instructor, both experienced in international travel and residing in foreign countries, organize and carry out a four-week business school program, following nearly a year of detailed planning. Nevertheless, a series of actual events and subsequent unanticipated consequences provide a number of valuable lessons that illustrate the inherent gaps in any such planning. The case is appropriate in undergraduate or graduate introductory educational administration/leadership courses and/or training seminars to provide the student a glimpse into the “real world” of teaching overseas at the university level.*

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### **INTRODUCTION**

Professor of Management Evan Addison looked forward to yet another stint as Site Director and instructor in his business school's annual month-long study-abroad program in Europe. As the “old man” in the well-established summer event at the same location in Germany, he could visualize what should transpire later in that very day. To be accompanied once more by his younger colleague in Marketing, bilingual (in German, no less) Robert (Bob) Belafonte, Evan's mind dwelled on the positive aspects of the adventure: Everyone would congregate at the airport this afternoon at 2:00 p.m., enjoy a leisurely overnight flight to Frankfurt, and take a mere one-hour train ride to the friendly German university which housed and fed them. As another courtesy, their luggage would be transported for them to their living quarters by way of a university truck after they were met and formally welcomed at the local train station by a senior administrator. This well-respected university of applied sciences provided state-of-the-art classroom facilities and proactively supported them in every aspect. Evan and Bob had developed some lasting friendships with the host university's International Office leadership and staff. Three all-day industrial field trips had been carefully arranged to the smallest detail, including transportation, meals, and guides as necessary; each plant tour had been done once or twice in the past so no surprises were expected. An optional five day excursion to Paris had been offered to the participants; the hostel where they always stayed was booked and paid for in advance. Things got off to a good start as smiling students and many parents were already wait-

ing when Evan and Bob arrived with the airline tickets, Eurail passes and pre-printed luggage tags packaged individually in special envelopes. Cell phones seemed to be in use by nearly everyone, including the parents while the attendance was being checked. Of the group of 15, only one student was running a little late but she had called and soon appeared just as it was time to check the heavy luggage. Bob led the group to the Lufthansa counter. "Get a move on, you guys!" he called cheerfully, "You are about to have the adventure of your lives!" Though still optimistic, Evan couldn't help but wonder what surprises were in store for everyone as he lifted his suitcase onto the check-in scales, which suddenly seemed heavier than it had been that morning. "Could that new traveler's compact scale he just bought be inaccurate?" he thought. "No, I shouldn't start this trip by worrying about anything."

#### **INCIDENT 1: LATE ARRIVAL AT THE FRANKFURT AIRPORT**

Drs. Evan Addison and Bob Belafonte had spent time many months ago selecting an optimum departure time from the Frankfurt airport by train. They had allowed for a possible delay in the arriving flight time and considered that some students might want to buy one-way train tickets rather than using up a valuable Eurail pass day. There was also the need to allow time for the authorities to activate the passes, which would take a few minutes for each person after standing in line and presenting passports for identification. Evan began his typical "what if" thinking ritual as he sipped a second cup of coffee aboard the plane. Bob dozed nearby and several students were chatting away while flight attendants methodically cleared away the remains of a surprisingly civilized meal. He heard one student warn his seatmate to go easy on the free wine. Evan then recalled the series of email exchanges with Dr. Schwarz, Director of the International Office and their program host in Germany. Dr. Schwarz had voiced mild astonishment that Evan and Bob had allowed four hours or more after the plane was to arrive before the group would leave the airport by train. He had encouraged an earlier train departure time and noted that this decision would impact his own arrangements for the luggage pickup at the local train station. The suggestion had also been given that train seat reservations should be made because that time of day was a busy one for rail travel. Evan had taken the initiative to purchase those reservations in advance over the internet. He had receipts for the group to use in conjunction with their Eurail passes or tickets after boarding the train. Mulling over the scenario for a while, he suddenly frowned.

"Uh oh," Evan exclaimed aloud, waking up Bob. "What's the matter, Evan?" Bob asked, rubbing his eyes. "Well, I just remembered that I never got around to firming up that train schedule with Dr. Schwartz. I told him that I would let him know if you and I decided to depart earlier from Frankfurt as he recommended!" "You worry too much, Evan. Relax," Bob retorted. "Dr. Schwartz is a clever man and he'll be waiting at the train station with that truck and crew just like last year."



As it turned out, the plane was more than two hours late and by the time the group cleared customs there was not enough time remaining to get lunch or make cost-benefit analyses about using Eurail passes versus buying rather expensive one-way tickets. Evan instructed everyone to line up immediately and get their Eurail passes activated whether or not they wished to buy one way tickets. Time was of the essence. The line was long and slow-moving. Officials were polite, methodical, but in no particular hurry. Both leaders sensed a general feeling of frustration if not panic as the clock ticked down toward their scheduled train departure time. Tension mounted as the last two students struggled to find and retrieve their Eurail passes from their luggage. Evan asked Bob to lead those who had finished the process quickly toward the train while he remained to bring the stragglers.

Elevators or escalators were needed to reach the departure site. No thought of locating the specific rail car with their prepaid seat reservations crossed anyone's mind during the footrace. Evan and the last group of students literally ran, dragging their luggage to the platform which of course was packed with travelers just as Dr. Schwartz had predicted. But to surpass that scene, he saw that the high speed train had two connected engines facing each other, located right in the center of a very long configuration of rail cars. Independently, Evan and Bob reached the same immediate conclusion: Both leaders were certain that the train would surely be split apart later in the trip toward different destinations. Needless to say, there was no internal interconnectivity for passengers in route between the two trains, "Did anyone see Dr. Addison's group get on the train?" Bob called to some students. No one had, and it was assumed that the stragglers either missed the train altogether or they would likely be heading in a diverse direction before long.

Meanwhile, as the train doors slammed shut behind him and he found a seat, Evan momentarily regained enough composure to retrieve and switch on his European cell phone to call Dr. Schwartz and reconfirm the arrival time. The final straw came when Dr. Schwartz told him that since he never heard back from Evan a few weeks ago, he had not made any arrangements to have the heavy luggage transported to their quarters! They would have to use public transportation.

## **INCIDENT 2: WHAT WE GOT HERE IS FAILURE TO COMMUNICATE**

Both Evan and Bob were feeling confident that all their planning over the previous 12 months had prepared them for almost anything. Over breakfast on the first day in Germany the two of them were comparing notes on the week's activities when Patrick, one of their students, walked up to their table in the cafeteria with a problem. "I need someplace to keep my medicine!" stated Patrick. "What medicine, Patrick?" enquired Evan. "Can't you just keep it in your room?" added Bob. Patrick replied, "Oh, no. This is my insulin that I have been taking since I was a kid and it MUST be refrigerated!"

Both Evan and Bob looked at each other in surprise as they had not known that Patrick, or any of their study abroad students, had any special medical requirements. During the previous months of planning for the trip the two instructors had experienced various challenges in obtaining information from program administrators back at their university in the States. Information that should have been shared with them as instructors on the trip just was not forthcoming. Senior officials, often legitimately concerned with privacy issues under the law, tended to provide such information on a “need to know” basis.

“Well, don’t worry, Patrick. I’ll ask the manager of the hostel here and I am sure it will not be a problem for them to place it in the kitchen’s refrigerator for you,” said Bob. Bob and Patrick then took the insulin to the front desk and spoke with Rolf, the hostel manager and Dieter, his young, part-time assistant who was always eager to help and practice his English. Rolf, a man of few words, assured Bob and Patrick that the medicine could be kept in the kitchen “cooler” and then instructed Dieter to take care of it. Dieter took the medicine and walked briskly off to the kitchen, very happy that he could be of such assistance to his new American friends.

At breakfast the next morning, Evan and Bob barely got one sip of hot coffee before their daily meeting was interrupted by Patrick bursting into the cafeteria screaming, “My medicine!! My medicine!! It’s all ruined!!! Over \$4,500 worth of medicine that I need for the whole month is frozen!!!” After checking with the kitchen staff, Evan and Bob determined that Patrick’s insulin had indeed been frozen. In his enthusiasm to help the previous morning, it seems that Dieter had placed the insulin in the freezer instead of the refrigerator. Patrick’s much needed insulin was unavailable and panic was starting to overcome him. “I am gonna sue!! I’m gonna sue!” Patrick claimed as he marched off to call his parents back in the States. Evan and Bob just looked at each other and wondered what could be done now.

### **INCIDENT 3: IMPROMPTU TRAIN TRIP**

Despite the somewhat shaky Monday start, the study-abroad participants had handled the tumultuous arrival in Germany and jet lag maturely and by Tuesday were already busily fine-tuning their plans for various weekend sightseeing excursions. Bob and Evan, however, were faced with another dilemma. Just a week ago before the trip began, Evan had received an unsolicited email message from a hostel in Berlin asking for a sizable amount of money as the “now due balance” on reservations made nearly a year ago on the group’s behalf by the German host institution. “What trip to Berlin?” Evan had retorted before learning the stunning truth: During a visit by dignitaries (including the dean of his college) shortly after the previous year’s successful program, a well-meaning staff person in the German host institution had asked whether or not the next year’s group would like him to plan an excursion to Berlin. Everyone agreed that this would be a nice opportunity, not realizing that this verbal acceptance was much more than a



general support of an idea. The actual reservation was made for twenty people and the host institution paid the deposit on behalf of the American program. Since the German institution's International Office had numerous consortiums underway year round, often arranged these sorts of trips, and the deposit had been made, they made no more mention of it and left the responsibility of follow up to their guests from the U.S.A. Rather than causing embarrassment to anyone, the home institution's College of Business decided to accept the responsibility but assigned Evan with the task of convincing as many students as possible to take the trip in order to recoup at least some of the monetary loss.

Evan and Bob managed to convince half a dozen students to take the spontaneous trip, leaving bright and early on a high speed train which made daily stops in their host city. The leaders purchased seat reservations and briefed the small group on the essentials. "You will be amazed at how efficient the rail systems are in Europe," Bob told the students. "There will be charts or electronic signs with diagrams and once you know your rail car number you can see exactly where to stand on the platform. When the train stops, you will see your car practically in front of you so you just hop on and locate your reserved seat. "It'll be especially easy this time," added Evan since we are all on the same car. Be sure to bring your Eurail pass and your passport."

Everyone gathered as planned at the noisy platform. The public address system blared out a succinct message in German. Bob thought he heard what seemed to be an announcement about the train to Berlin and saw some passengers looking nervously around as the train rapidly approached, then stopped. Doors opened and the crowd surged forward. Evan was busy taking a video of the arrival. "Hey, guys!" one of the students yelled, "I don't see any rail cars with numbers even close to the one we're looking for! Something's wrong!" Bob spoke with a rail official in German who explained that the regularly scheduled train had some mechanical problems so another train had been assigned. He was told to board any car, but to hurry because the train would depart in exactly three minutes. Bob waved the group to follow him and everyone rushed to find a car entrance that wasn't already packed with would-be boarders and suitcases. A kind woman saw the bewilderment in Evan's face. She suggested that the group run further down the track and board one of the rail cars designated as being first class, i.e., displaying a large numeral 1. Evan, Bob and the students followed her, climbed aboard and were relieved to find empty seats for the long trip ahead. "But I thought that since first class tickets cost a lot more than the second class ones we have, they wouldn't allow us here," Evan said, nearly out of breath. Smiling broadly, the "good Samaritan" woman said that this was the only positive thing about a last minute change of trains. "No one has any reservations now, so it's first come, first served!" She added that the group should not be intimidated if passengers insisted on having their reserved seats. "Now there's a tip worth sharing," Evan thought to himself. At other stops on the trip, additional first class passengers boarded and tried to eject the apparent "squatters" to no avail. He was pleased to see one instance where a student did relinquish his seat for a senior citizen.

The remainder of the quick weekend adventure was enjoyed by all, the only regret being the original international communication breakdown which had lost money for the program and prevented more student participation. That would never happen again, he vowed.

#### **INCIDENT 4: LA VIE À PARIS!**

Having just arrived into Paris' Gare d'Est station on the high-speed train and being excited to be in the famed "City of Light," the students eagerly received their youth hostel room assignments and half-heartedly listened to Evan's and Bob's instructions and warnings about traveling about Paris. Practically before Evan and Bob could say "Bienvenue à Paris!" the students had deposited their luggage and scattered to the winds of Paris. "Well," Evan said looking at Bob, "this has the makings of a very interesting visit for all of us!"

One student, Clarise, had been looking forward to visiting Paris the whole month. Unfortunately, Clarise's boyfriend had broken up with her the very day before she departed the U.S.A. for her summer experience. Having read so much about Paris and having heard that it was a city of fashion and romance, Clarise thought that shopping and Parisian boys would be the perfect antidote for a broken heart. After having stored her already bulging "one piece of luggage" in the hostel's luggage closet, Clarise headed off with the other students to explore what Paris had to offer.

Over the next couple of days Evan and Bob noticed that a new young man had been joining their students for dinner in the hostel's dining room, always sitting next to Clarise. That evening Bob decided to join the students for dinner and noticed that the fellow had purchased a few bottles of good wine for everyone to share. Bob, having decided to introduce himself to the generous youngster, walked up to him, offered his hand and said, "My name is Dr. Bob Belafonte, but my students call me 'Dr. B'. Thank you for sharing your wine with us. That was very nice of you!" Clarise then chimed, "Dr. B, this is Hassan, my friend that I met at a bar on our first night in Paris. He is from Algeria and is studying architecture here in Paris." Hassan shook Bob's hand and said with a broad smile, "It is a pleasure to meet you, Dr. B. The scholarship I have from my government provides me with more than enough money each month for food and I have not been spending it all. Sharing a few bottles of wine is the least I can do for people who have been so friendly to me. I am glad you enjoyed it."

The group saw more and more of Hassan during the remaining days they spent in Paris. Clarise continued to go on shopping forays, not only to the department stores, but also to some more exclusive shops. Each time, Hassan was close in tow, often purchasing things for Clarise. She even had to buy another large suitcase to fit everything she had acquired in Paris (and Germany!). On the day before the departure from Paris, Hassan had bought Clarise a very expensive-looking ring with a blue sapphire in the middle. On the day of departure, students were responsible for getting their luggage onto Paris'



Metro, the subway system that would take them to Gare de l'Est for the train back to Frankfurt. Like Clarise, a few other girls had not heeded the warnings of Evan and Bob regarding luggage in Paris and had purchased suitcases to carry their new possessions. As some of the Metro stations have winding tunnels and numerous levels of stairs, most of them had a great deal of trouble negotiating the stations with their added luggage. The boys of the group helped out as much as possible, but had their own luggage to carry. Lucky for Clarise, Hassan was seeing her to the station to say their good-byes and could help her with her luggage.

At Gare de l'Est, the group had over an hour to wait. Most spent the time purchasing food and drink for the 2 ½ hour ride to Frankfurt. Evan and Bob tried to keep the group together in the busy station as much as possible. They were challenged by the French train system's policy of not announcing the departure track until right before the train's departure, giving passengers precious few minutes to find the train and their assigned car on the train while dragging their luggage. Clarise, with reddened, tear-filled eyes slowly boarded the train as Hassan watched from the platform. Their eyes did not release each other's gaze until the train slowly pulled out of the station on its journey to Frankfurt. Concerned with Clarise's disposition, Bob sat next to her and asked Clarise if she was alright. "Oh, I'm fine," Clarise responded with tears in her eyes. "He is going to come visit me in the States and we are going to stay in touch via Skype." After waiting a few minutes to allow Clarise time to compose herself, Bob gently explained to her, "Clarise, I do not want to sound insensitive, but it is my responsibility as one of the leaders of this group to ask whether Hassan has given you anything to take back to the States besides the clothing and ring he bought for you?" To which Clarise quickly responded in an incredulous voice, "What on earth are you talking about, Dr. B?"

#### **INCIDENT 5: A LEADERSHIP LESSON ON EFFECTIVE FOLLOWERSHIP**

Dr. Evan Addison always felt more confident in leading groups of study-abroad students on field trips when he had prepared detailed Instruction Sheets for each participant, which he commonly referred to as "poop sheets" to the bemusement and amusement of the young people (Exhibit 1). "Where are we supposed to meet?" or "How long is this bus ride?" would be handled by his reply of, "Check your poop sheet. You did bring it, didn't you?" If trips were repeated in subsequent years, Evan would use an updated version, adding to what had worked in the past. He realized of course that students rarely felt the need for these information sheets unless they found themselves separated from the leader or the group. He often asked them to keep their eyes open for directional signs or landmarks as they made their way to special destinations.

What might purport to the model of a perfunctory short trip is the fast train ride from Frankfurt Main to the Frankfurt airport. On the very last day of the program, the group headed through the train station for this simple connection, made foolproof in Evan's mind since he had reprinted and distributed last year's instruction sheet. At the bottom

of the escalator when they were approaching the platform Evan was looking to no avail for Train number S8 as cited on the “infallible” poop sheet when a student cried out, “Say this poop sheet thing is wrong! We need Train number S9, not S8! Number S8 goes in a different direction, Dr. Addison!” “That’s impossible,” Evan replied deliberately displaying great calmness, “Trust your poop sheet!” The student’s persistence soon paid off for everyone when Bob had a flashback to the previous year and agreed with him. “I remember now! I was at the head of the stampede and instead of checking the sheet I got directions from a rail official who just happened to be standing there. The poop sheet had an error last year and we never realized it!” They would have lost a great deal of time and missed their planned rendezvous with the host university’s luggage truck if they had taken Train S8. Evan’s feeling of chagrin quickly turned to a “Eureka moment” when he realized the valuable management lesson learned here: Effective team members should not lean solely on the formal or informal leader for direction. By doing so they are shunning responsibility, not developing themselves, and opening up opportunities for group mistakes or failures. Evan wondered if he could pass this inadvertent real-life lesson on to the students before they dispersed, perhaps never to meet again as a group. He knew full well that it was far too late in this trip to expect students to pay serious attention to much of anything beyond being back at home tonight.

## **EPILOGUE**

Drs. Addison and Belafonte didn’t cross paths again until the fall term began. Most of the students returned to the campus and eventually it was learned through the grapevine that (1) Clarise and Hassan had broken up, (2) Patrick’s family was independently wealthy so he was having no difficulty receiving a steady supply of insulin; in fact, he had been known to be very careless in handling his medicine so there was not even a hint of a pending law suit, and (3) that an idiosyncrasy of their own university’s computer network firewall had been blocking email messages from certain individuals on the overseas host university’s International Office staff, which partially explained the nearly aborted excursion to Berlin. “It looks as if we still have plenty to learn,” Evan remarked as they sat down for some coffee. “No doubt about it,” Bob retorted. “Are you ready to do it again next year?” “Let’s go for it!” Evan said without hesitation and with a big smile.



## **EXHIBIT 1**

### **Sample Student Instruction Sheet**

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Field Trip No. 2: AUDA AG, Neckarsulm, Wednesday, July 21

1. Assemble at **7:30 a.m.** at the Hostel and depart immediately on foot to “Europaplatz.” (If you miss breakfast you can get something at the Hauptbahnhof (Hbf) to take on the train.)
2. Take **Tram #2** in the direction of **Tivoli** or **Tram #4 from Europaplatz to the Hauptbahnhof (Hbf)**. We already have group tickets that will be used all day.
3. In **FRONT** of the Hbf, we take **regional train/tram ES4 (WITH NO TOILET!)**, arriving then departing *quickly* at **8:25 a.m.**, arriving in Heilbronn (Bahnhofsvorplatz) at **9:48 a.m.** **We change trains there** and board **Train number RE 4834, Platform 3** (any second-class wagen; no reserved seats; we already have another set of group tickets just for this short ride) to arrive only *four minutes later* in Neckarsulm at **10:10 a.m. Be on your toes!**
4. The plant is a very short walk from the train station. **Our Greeting Session (10:20-10:35 a.m.)** will be held on the Foyer, 2nd floor. If for some reason you become lost, call Ms. Angela \_\_\_\_\_, Dr. Addison or Dr. Belafonte.\* *Audi will provide refreshments during the greeting session.*
5. **The Audi Forum** (giant showroom on two levels) **Tour** is from **10:35 until 11:10 a.m.**, (Photography allowed) followed by **Lunch** at the Audi staff restaurant from **11:10 until 12:30 p.m.** (shuttle arranged by tour guide). There are lockers for any belongings you wish to secure (1 Euro which will be returned).
6. **Production tour of the R8, A6 and A4 models** starting at the Audi staff restaurant, **12:30-14:00** (NO PHOTOGRAPHY ALLOWED IN THE PRODUCTION AREAS).
7. Depart at 14:00 by factory transportation (shuttle bus) for Wartberg (guided tour with explanations in English) and a **wine tasting and buffet later in the afternoon**. Our host will be vineyard owner Mr. Andreas \_\_\_\_\_.
8. Afterwards, the Audi shuttle bus will take us to the Heilbronn Hofbahnhof, where we depart for Karlsruhe on **Tram ES4** at either 6:07 or 8:07p.m. and arrive in Karlsruhe (Europaplatz) at either 7:33 or 8:33 p.m. NOTE THAT THIS RETURN TRAIN ALSO HAS NO TOILET FACILITIES!

\***AUDI CONTACT PERSON:** Ms. Angela \_\_\_\_\_ 0151-5434 \_\_\_\_\_

**Dr. Addison:** 0157 03480177

**Dr. Belafonte:** 0157 834800

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## **EXHIBIT 2**

### **Cast of Characters**

Dr. Evan Addison	Professor of Management, Site Director/Instructor
Dr. Bob Belafonte*	Associate Professor of Marketing, Instructor
Dr. Schwartz	International Office Director, host University
Patrick	An American study abroad student
Rolf	Manager of the student hostel in Germany
Dieter	An employee of the student hostel in Germany
Clarise	An American study abroad student
Hassan	An Algerian student studying in Paris

\*aka "Dr. B"

### **Additional Readings**

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- Ware, Fred A., Jr., (2004) A Study Abroad Director Tells All. *Southeast Case Research Journal*. 1(1). 71-77
- Young, J.R. (2002). When Trips Abroad Go Bad. *Chronicle of Higher Education* 49(6). p A49, 2p, 1c, 10/4.