

## Using scenario analysis to build university faculty & student travel competencies

Jacqueline A. Williams  
North Carolina A & T State University

Kimberly R. McNeil  
North Carolina A & T State University

### ABSTRACT

As the spectrum of University sponsored travel for educational and professional purposes continues to expand, faculty chaperones are faced with the challenge of counseling a diverse group of student travelers, including those with varying levels of travel experience as well as students with medical conditions or special needs. With appropriate planning and advice, most faculty and student travel teams can experience safe and rewarding travel. However, many travelers are unaware or unprepared for travel challenges and avoid considering worst case scenarios ranging from health risks or illness to breaches in cultural or legal protocols. The intent of this paper is to apply scenario planning theory and practice to the development of faculty and student travel competencies. In this paper we propose that scenario analysis can help faculty and students prepare for and manage the travel experience in a way that will build travel competencies and improve travel outcomes.

Keywords: scenario planning/analysis, travel competencies, faculty development

## INTRODUCTION

Faculty and students at colleges and universities are intensely pursuing travel opportunities for educational and professional purposes. Study abroad programs, as well as student oriented conferences and competitions are catalysts for increased university travel alongside the traditional array of sports and athletic program related travel (Patterson 2005). Support for the more contemporary venues requiring university faculty and student travel is based on cited benefits of experiential learning, networking opportunities, and an overall broadening and developmental experience for students that augment campus life.

A substantial body of research is available regarding the logistical preparation of faculty and students for their travel experience (Koernig 2007). This literature provides specific recommendations to help faculty members organize, plan, and conduct travel. Included in these recommendations are strategies to help manage student anxiety during the pre-trip sessions, acclimate students to their new environment, balance academic content with cultural activities, select types of learning activities, and facilitate student exchange with the local community. However, a gap exists in the literature regarding how to prepare faculty and students for handling adversity during the travel experience (Staats, Panek, and Cosmar 2006).

The intent of this paper is to apply scenario planning theory and practice to the development of faculty and student travel competencies. In this paper we propose that scenario analysis can help faculty and students prepare for and manage the travel experience in a way that will build travel competencies and improve travel outcomes. This paper proposes to apply the research, theory, and practice of scenario planning (Chermack, 2005; O'Brien 2004) as part of the instructional design efforts focused on enhancing the skills and competencies of faculty and student travelers.

Every travel experience can be viewed as a story with an ending ranging from the expected, pleasant experience to the surprisingly unpleasant drama. Training and development efforts that prepare faculty and students for a range of travel outcomes are warranted (American Council on Education, 2006). Travel advice prior to departure may help decrease the likelihood of catastrophic events (Coffey 2004) and improve student behavior while representing the university. It is important for a faculty chaperone to know what to communicate and how to communicate to students not only about expectations for travel that unveils according to plan, but also about contingencies for when unplanned, unpleasant travel incidents occur.

Many accidents have occurred during university travel over the years. As reported by the American Council on Education (2006), in 2001, out of six Wheaton College students traveling, one died and three suffered severe injuries when the students decided to start their drive home after their night departure was delayed for several hours. Reports theorize that the student driver either fell asleep or was distracted because there were no signs of the vehicle reducing speed. That same year, six Utah State University students were injured (one critically) as a result of not wearing seat belts in a vehicle occupied by students. Other true stories of students who ended up miles from home in situations beyond their worst nightmares can be readily found in the popular press. For example, National Geographic has created a video called "Locked up Abroad" that tells

the extraordinary tales of ordinary people locked up abroad and how they regained their freedom.

Given that unexpected travel adversity can and does happen, we consider the significant pool of university faculty and students that travel on behalf of their institutions to a variety of venues, domestically and abroad, and propose that the scholarship of teaching and learning be applied to university sponsored travel preparation that acknowledges “worst case” scenarios as well as the rewarding outcomes related to travel. We use an interdisciplinary approach, integrating social science literature from medicine, business strategy, tourism management, operational research, and future studies to apply scenario planning methods to the development of faculty and student travel competencies. First we provide a brief overview of the traditional pre-travel briefing. Second, we propose the use of scenario planning as part of the pre-travel process and provide examples of travel scenarios addressing adversity. We conclude with a summary of the steps for facilitating scenario discussions.

### **TRADITIONAL PRE-TRAVEL BRIEFINGS**

A pre-travel briefing informs participants about what to guard against and what to expect during the travel experience. They are important for personal safety as well as to safeguard the reputation of the institution. Disseminating the message that people need to seek council before they travel in a reasonable timescale is crucial to the efficient and effective delivery of travel advice (MacDougall and Gyorkos, 2001). The format of a travel briefing can be a group or individual conversation. In addition, documentation is often necessary to be compliant with university travel policies and procedures.

A pre-travel briefing entails a collection of information regarding the traveler and the nature of the trip. A travel briefing form (Appendix 1) contains three major parts that can be adapted as necessary. Information about the traveler is included such as age, gender, medical history and current health status (i.e., medications or allergies to drugs or food), previous experience traveling, current knowledge of the area traveling to, relevant comprehensive insurance provision, and any special needs. Today it is essential to make a thorough assessment of the traveler to provide appropriate advice. Suh and Mileno (2005) note that along with a discussion of immunizations, additional advice regarding supplemental health insurance, accidents and injury, motion sickness, jet lag, extremes of temperature and sun exposure, and food and water safety should be provided. Although the demands on a faculty advisor or coach accompanying students increases with the inclusion of a travel briefing, last minute preparations and/or emergency triage can be avoided.

The briefing would include information about the traveler’s itinerary such as destination, departure date, length of stay, mode of transportation, quality of accommodations, and health care standards at destination. The pre-travel briefing also covers the purpose of trip, planned activities, and financial ramifications. Pre-travel briefings can be arranged to facilitate student interaction before travel in addition to sharing pertinent trip information.

Traditional pre-travel briefings are held as discussion groups that include watching travel videos, viewing photographs, and listening to lectures about planned activities. Without the aid of pre-travel briefings, most of what students learn about

traveling is through trial and error or by traveling with someone more experienced. For example, most experienced travelers will 1) write down all confirmation numbers (hotel, rental car, and/or airline) in at least two places, 2) pack everything into one suitcase to carry on board, and 3) wear and/or pack dark clothes because they do not show spots or dirt and they work for most occasions. These travel tips have been recorded in a plethora of books, are available online, and can be elaborated on during pre-trip meetings.

Travel briefings also provide an opportunity for faculty-to-student bonding as well as student-to-student bonding. Multiple pre-trip sessions are advised to manage rapport and discussion and to gauge student interest in specific activities scheduled for the trip. If modifications to plans are needed, the pre-trip sessions can be used to assess and communicate travel plan changes.

While universities offer policies and procedures for faculty and students to prepare and manage a sponsored travel experience, we have not found in the teaching or travel literature an application of scenario planning and analysis for teaching and learning about travel. In addition, a gap in the literature exists detailing how to communicate to students about adverse travel situations. Thus, we propose that scenario analysis be incorporated in pre-travel briefings as a teaching and learning practice for travel training including contemplating unpleasant or adverse travel situations.

## **SCENARIO ANALYSIS AS a TRAVEL BRIEFING TOOL**

A scenario is a story about how the future might turn out. Among the many tools that one can use to contemplate an uncertain future and improve performance in a dynamic environment, scenario planning and analysis is gaining credibility as an effective tool, providing for a structured process for thinking about and anticipating the unknown future. Bishop, Hines and Collins (2007) aptly notes that scenario analysis is built upon two premises: 1) that it is critical to think about the future or else we run the risk of being surprised and unprepared for it and 2) the future is uncertain so we must prepare for multiple plausible futures and not just the one we expect to happen.

Scenario analysis is a process of analyzing possible future events by considering alternative possible outcomes (Wack 1985; Schoemaker 1995). Using scenario analysis as a preparation strategy forces one to take a good look at the possible futures and ask am I going to be ready for this ending or outcome. Scenario analysis has been cited as exceptional for its ability to capture a range of possibilities in rich detail that allows one to examine possible future developments that could directly impact an individual or an organization (Schwartz, 1991). Scenario analysis has the cited benefits of unmasking and/or identifying factors that contribute to an array of potential outcomes of a situation, while enabling one to anticipate and evaluate outcomes across possible environments (Flowers, 2003).

The process of scenario analysis is widely recognized as a tool for anticipatory learning and decision making (Fahey and Randall, 1997; Millett, 2003). Chermack (2005) presents a model of scenario planning linking the scenario to the final performance or behavior of the scenario analyzer. In a sequential manner the scenario, as the catalyst, influences learning and reflection, which reveals and alters mental models. Subsequently the mental models impact decision making and ultimately influences performance. Thus a correlation stream can be depicted as scenarios → learning →

mental models → decisions → performance. Chermack (2005) outlines the underlying propositions of the model as follows:

Proposition 1: If scenarios are positively associated with learning, then learning will increase as a result of participation in scenario planning.

Proposition 2: If learning is positively associated with the alteration of mental models, then mental models change as a result of learning.

Proposition 3: If a change in the mental models alters decision structure, then a change in mental model implies a change in the approach to decision making

Proposition 4: If changes in decision making are positively associated with performance, then performance will increase as a result of altered decision-making strategies.

Proposition 5: If scenarios are positively associated with learning, learning is positively associated with altered mental models, altered mental models are positively associated with change in decision-making and change in decision making positively associated with performance, and then scenarios can be positively associated with performance.

Travelers can learn how to anticipate and prepare for the future through scenario analysis. Travel scenarios can serve as catalysts that ultimately influence behavioral options. The scenarios can be constructed from practical knowledge, previous research, or a preliminary qualitative study to identify relevant factors. For example, Larsen, Brun and Ogaard (2009) developed the Tourism Worry Scale based on general service and tourism literature. The aim of the scale was to examine travelers' worries regarding typical negative outcomes of tourism trips. They collected adverse travel incidents or worries reflected in popular media and academic research. They identified travel hazards such as food poisoning or illness due to water sanitation, infection or infectious diseases, traffic accidents and concerns about travel arrangements such as driving conditions, and petty crimes, violence or victimization through other forms of criminality. In addition, tourism research included traveler concerns about unanticipated weather conditions or hassles with customs or border security.

Table 1 contains a list of typical travel worries and scenarios that reflect the potential travel hazard (based on the author's personal experience). Scenarios are constructed using a series of sentences with factors relevant to how one would handle the incident. The range of possible conditions for each factor can be represented in angled brackets <> for each factor. As discussed earlier, the pre-travel briefing should contain information about the traveler such as age, gender, medical history and current health status (i.e., medications or allergies to drugs or food), previous experience traveling, current knowledge of the area traveling to, relevant comprehensive insurance provision, and any special needs. Each of these factors can be cited in a travel scenario and used as a basis for a discussion of its importance and consequences.

There are different types of scenarios (Huss and Honton 1987). Scenarios can be predictive and evoke thoughts about what will happen. Scenarios can also be proactive and induce thoughts about what changes need to occur or policies to apply to achieve a certain objective. Two examples of a predictive and a proactive scenario are provided in Table 2.

## **FACILITATING THE SCENARIO DISCUSSION**

Equally important to the development of sound scenarios is the discussion management process (Ven der Heijden, 1996; Godet and Roubelat 1996). The delivery of the scenarios and the fostering of dialogue beyond the set up of the scenario are crucial to the understanding of the importance of the points being emphasized and the comprehension of the key learning lessons. Table 3 lists steps to take when preparing to lead a discussion using scenarios.

The overarching theme for this discussion management process is to take time to plan. Trying to lead a discussion without proper preparation can be disastrous. The entire time allotted for discussion can come and go and without a plan, no knowledge transfer will have occurred. The first step is to start with a clear picture of what goals are to be accomplished in the session. This step is an important step because it sets the stage for what goes on in the remaining steps.

After goals have been established, the second step is to write down the objectives. The objectives are more pointed than the goals and link to the scenarios and the scenarios development process. Objectives play a role in the determination of how many different scenarios are beneficial to the session. Generally speaking, more objectives translate into the formulation of more scenarios. O'Brien (2004) suggests that learning outcomes of using scenarios in developmental processes can include aiding in understanding of the situation, rather than providing a single definitive answer to a problem. In addition, scenarios can help the trainees look at a situation in a new way.

Step three, thinking the scenario(s) through, is a time consuming step; however, when done properly, ensures positive results with regard to discussion stimulation. Think about what participants might say as they process the scenario. Think about what "lessons learned" are important take-a-ways for the scenario. Make sure that ways to lead the dialogue are in mind that will assist with the connection of the conversations to the take-a-way moments. Additionally, after one scenario has been fully processed, have other scenarios with the same basis in mind to cause deeper thought. For example, in one scenario, a student may be used as the person exhibiting improper behavior. In the next scenario, simply change the student to one of the faculty leaders and carry the discussion further. Minor changes such as this one forces participants to remain attentive and open minded to the idea of learning from the scenarios. It is also helpful to have multiple outcomes prepared. Having multiple outcomes to share allows for smooth transitions and often times transcends the dialogue to another level, a higher level of thinking. How does this translate for the participants? The participants yet again are challenged to think critically. They are given the task of processing multiple outcomes and discovering the key lessons for themselves. Self-discovery makes the learning process easier to retain and more meaningful.

The last step, be ready for unexpected twists, refers to the discussion leader minimizing the number of surprisingly difficult situations he or she may encounter. The discussion management process can be tricky, especially if the potential discussion has not been thoroughly thought through. Proper preparation, especially processing step three, is beneficial to the discussion leader because there is less likelihood that conversations will go in an awkward direction. The preparation process will assist the discussion leader with reading the flow of the discussion and steering the dialogue in another direction if the discussion calls for a direction change. As an individual gains experience with scenario discussion leadership and becomes an astute discussion leader, anticipating situations will become second nature and participants will be oblivious to the near breakdown of the discussion.

## CONCLUSION

The goal of this paper was to take the first step toward providing faculty with a new methodology for impacting travel readiness – scenario analysis. This paper explores the use of scenarios to enhance university faculty members and students' travel savvy and address important elements of travel policy, safety, and preparedness.

Any faculty member who has played an integral part of planning or leading a student oriented travel experience knows that it is a lot of work and responsibility. Even as the university seeks to support travel, many of the preparations and risks fall on the shoulders of the faculty. In fact, faculty and students are often unaware of the travel policies and procedures for their institution. The future travel plans of university faculty and students may be influenced by both positive factors such as the results of an enjoyable and exciting learning adventure, or by negative factors such as unpredictable group dynamics or individual crisis. By developing faculty and students to be vigilant with respect to pre-travel orientation and post-travel debriefing, safe and exciting travel experiences can be ensured.

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APPENDIX 1

Sample Pre-Travel Briefing Document

Traveler information:

Name \_\_\_\_\_ Age \_\_\_\_\_ Gender \_\_\_\_\_

Do you have any recent or past medical history that should be noted? (This includes diabetes, heart and/or lung conditions.) If yes, please explain.

List current medications \_\_\_\_\_

Do you have any food or drug allergies? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, please explain.

Previous travel experience \_\_\_\_\_

Where traveling \_\_\_\_\_

Knowledge of area traveling to? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you have travel insurance? Yes \_\_\_\_\_ No \_\_\_\_\_

Any special needs?

Itinerary information:

Destination: \_\_\_\_\_

Departure date \_\_\_\_\_ Length of Stay \_\_\_\_\_

Mode of transportation \_\_\_\_\_

Accommodations \_\_\_\_\_

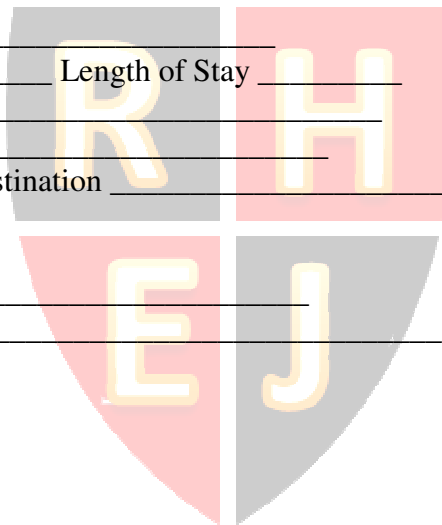
Health care standards at destination \_\_\_\_\_

Other information:

Purpose of trip \_\_\_\_\_

Planned activities \_\_\_\_\_

Financial ramifications \_\_\_\_\_



| TABLE 1                                                                                               |                                                                                                                                                                                                                                                                                                                                               |
|-------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Travel Briefing Topic                                                                                 | Scenario                                                                                                                                                                                                                                                                                                                                      |
| Lost documents or money; hotel reservations, train tickets or other travel documents contain mistakes | Imagine one of the student travelers, a <21 year old> <Caucasian> <male> collapses while the group is visiting a cultural attraction/site. Although students have been told to keep their emergency contact and insurance information with them at all times, upon checking his pockets, it is clear this student did not follow that advice. |
| Social unrest, terrorism, or war                                                                      | Imagine arriving at your destination hotel and finding service employees picketing in front of the building.                                                                                                                                                                                                                                  |
| Getting lost or losing contact with travel companions                                                 | Imagine a faculty-led group of students is traveling in a foreign country and they are using the subway. While boarding, <one student> is separated from the group because the doors close before he can get on and he does not speak the native language.                                                                                    |
| Financial mistakes or mishaps                                                                         | Imagine there are four days left on your trip and one of the student travelers has spent lavishly on <souvenirs> and does not have money left for food.                                                                                                                                                                                       |
| Being late for transportation (trains, buses, or airplanes); worry about time or appointments         | Imagine it is time to leave the hotel for the first professional visit and <one student from the travel group> is not in the lobby and is not in his room.                                                                                                                                                                                    |
| Inappropriate attire worn or behavior displayed                                                       | Imagine it is the morning of an official program visit and the travel group is meeting in the hotel lobby. The required attire is professional dress and <one of the student travelers> enters the lobby in tattered jeans and tennis shoes.                                                                                                  |

| Table 2                 |                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Travel Briefing Topic   | Directions: Ask students to imagine alternative possibilities or solutions for each scenario                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|                         | Predictive Scenario – what can happen?                                                                                                                                                                                                                                                                                                                                                                              | Proactive Scenario – what should be done?                                                                                                                                                                                                                                                                                                                                                                                       |
| Medical History         | <p>Imagine one of the student travelers, a &lt;20year old&gt; &lt;female&gt; &lt;African&gt; &lt;American&gt;, is a &lt;diabetic&gt;. Her friends tell her that she does not have to share her medical information with the faculty trip leaders. She decides to ignore the section on the medical history form that asks for current health issues. What can happen if she does not disclose this information?</p> | <p>Imagine one of the student travelers, a &lt;20year old&gt; &lt;female&gt; &lt;African&gt; &lt;American&gt;, is a &lt;diabetic&gt;. She did not disclose medical information with the faculty trip leaders. She ignored the section on the medical history form that asks for current health issues. While travelling with the group she faints. What should be done if she faints?</p>                                       |
| Early or Late Departure | <p>Imagine one of the student travelers is a &lt;22year old&gt; &lt;male&gt; &lt;Hispanic&gt; &lt;American&gt;. He has a grandmother who was admitted to the hospital on the day he leaves for his study abroad tour. The airline tickets are non-transferable and non-refundable. What can be done if he has to return home because of his grandmother’s illness?</p>                                              | <p>Imagine one of the student travelers is a &lt;22year old&gt; &lt;male&gt; &lt;Hispanic&gt; &lt;American&gt;. He receives a phone call indicating that here has been a family tragedy and he needs to return home &lt;immediately&gt;. The airline tickets are non-transferable, non-refundable. He receives a message asking him to return home as soon as possible. What should be done if he has to return home early?</p> |

|            |                                                                 |
|------------|-----------------------------------------------------------------|
| Step One   | Start with a clear picture of what goals are to be accomplished |
| Step Two   | Write down the objectives                                       |
| Step Three | Think the scenario through                                      |
| Step Four  | Be ready for unexpected twists                                  |

