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THE INITIAL PLANNING PROCESS OF AN INTERNATIONAL SERVICE-LEARNING  
PILOT INITIATIVE UNDER DEVELOPMENT

by

DENISE PEÑA KROHN

A DISSERTATION

Presented to the Faculty of the University of the Incarnate Word  
in partial fulfillment of the requirements  
for the degree of

DOCTOR OF PHILOSOPHY

UNIVERSITY OF THE INCARNATE WORD

August 2018

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## ACKNOWLEDGMENTS

May He give you the desire of your heart and make all your plans succeed—Psalm 20:4 NIV

This venture gave me the opportunity to grow academically, professionally, personally, and spiritually. It was filled with a range of changes and emotions. The completion of this milestone marks a transition for me. So far, it has taken a lifetime to get to this point, and before moving forward, it is time to reflect. There are so many people to acknowledge. Many took part in helping me, and sometimes that aid was manifested just by being present.

First and foremost, I wholeheartedly give thanks to the good Lord. Through Him, all things are possible. I am extremely appreciative for all that He has given. I know He walked with me down this road because He gracefully revealed Himself and His love through others.

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aunt, and Osvaldo Constantino Vela, my cousin—taught me to have faith, high standards, and unconditional kindness and care. Maricela Eileen Bowman and Juan Fernando Flores, my cousins, were my best friends, and instrumental in my youth. Additionally, my cousin, Monica V. Flores, impacted me greatly, characterizing for me grace, beauty, and femininity.

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Guided by the Holy Spirit and the Blessed Mother Mary, may I continue to strive to do the will of the Father and Son. Praise be the Incarnate Word, forever and ever, Amen.

Denise Peña Krohn

## DEDICATION

To my mother, Catalina Vela Peña, I dedicate this to you. You are the reason for this journey. You instilled the value of education and learning. You encouraged me to do and to be my best. You are my model of a genuine heart, unwavering devotion, and strong work ethic. You showed me the commitment of service and the giving to others. Here is to our dream—to soar and explore.

## THE INITIAL PLANNING PROCESS OF AN INTERNATIONAL SERVICE-LEARNING PILOT INITIATIVE UNDER DEVELOPMENT

Denise Peña Krohn, PhD

University of the Incarnate Word, 2018

This research explored the initial planning process of an international service-learning (ISL) initiative under development that involved a collaboration among a south-central Texas private university, a ministry of Catholic Sisters in Peru, a U.S. non-profit organization, and a Peruvian optometry school. Three collaborators were founded by the same religious order. An overlapping in mission and values influenced the context. By delving into the expectations of higher education and its pedagogical practices, ISL's history and conceptualizations, and concepts of program planning and designing related to the fields of ISL and adult learning, this study presented significant program development aspects. Furthermore, the role of being a practitioner-researcher was highlighted. All work was viewed through John Dewey's historical theoretical works related to service-learning theory and his early 20th century philosophies of democratic and experiential education, and framed by Pechak and Thompson's (2009) Conceptual Model of Optimal International Service-Learning. This investigation was designed by Stake's (2005) qualitative intrinsic case study. Data sources included interviews, archived organizational documents, and an insider perspective. Data analysis included Spradley's (1980) Developmental Sequence and Taxonomy and Huckin's (2004) content analysis techniques. Findings revealed four major themes: individual contributions, group dynamics, collaboration, and preparation. One sub-theme emerged under collaboration—meeting—and two sub-themes emerged under preparation—logistics and scouting. A timeline also emerged, listing occurrences that wove in the discovered themes as dynamic features. This work contributes to the



ISL development before program design and implementation by modeling an initial planning process under development and introducing the holistic planning concept.

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## **Webbing the Initial Planning Process With International Service-Learning**

Fusing academics with pragmatic, service-oriented experiences to expand knowledge and vocational training is one way that higher education seeks to assist in cultivating a stalwart society. Since the early turn of the century, global scholarship and experiential learning through service to the community are two innovative paradigms and high-impact teaching practices shifting U.S. post-secondary education (Henard & Roseveare, 2012; Kuh, 2008). Current comprehensive teaching practices for adult learners urgently work to convert students into contenders for the worldwide workforce, pushing them to be capable of bearing the load of societal exigencies. The combining factors of internationalization with the heightened stress of global competition and economic efficiency, along with the plea for greater civic engagement, are propelling changes within the U.S. higher educational system (Henard & Roseveare, 2012). Although novelty and encouraged change are intrinsically linked, the connection between the two is also associated with institutionalized resistance to modify entrenched teaching and learning systems.

Proposing international service-learning (ISL) as an advanced and powerful change agent comes with opposition. Program planners, who may be involved in ISL initiatives, commonly face complexity, uncertainty, and resistance to change (Caffarella & Daffron, 2013). Change of any sort within the context of higher education is difficult, but civic engagement via service-learning proves to have long-lasting effects, influencing transformations in the most challenging areas of academia, such as in curriculum, organizational infrastructure, and campus-community partnerships (Bringle, 2009). Moreover, a blueprint to implement such compelling changes helps to facilitate foundational ideas, preemptive actions, and deliberate processes.

Developing a strategic plan for campuses to open the gamut of civic engagement from local to global is recognized as a central component in creating and implementing ISL within a U.S.

higher educational setting (Bringle, 2009). A well-documented strategy is crucial to strengthen the preparation to establish ISL, which is currently on the forefront. Understanding the initial stages of ISL directly tackles programmatic issues in planning processes, resulting in benefits to reach objectives; the participants, planners, and other stakeholders involved; and the ISL program itself. An ISL plan does not guarantee removing all obstacles for initiatives, but provides a structure to steer steps towards desired goals.

McBride and Mlyn (2012) assert that practice needs to coincide with research to improve ISL knowledge and its implications. Doing so marries pragmatic issues with empirical research, encouraging academics, policy-makers, and practitioners to seek educational solutions to concerns through research-based and methodological approaches with clarity rather than with opaque views (Boyask, 2012). Known procedures vetted through empirical investigations to prepare new ISL projects provide trusted guidelines to more accurately obtain intended goals and impact. Established models for planning programs for adult learners, such as Caffarella and Daffron's (2013) Interactive Model of Program Planning, range from simplistic to complex. The models are designed to provide a consistent, dependable process for program stakeholders and those affected by the implemented plan. The understanding of planning and developing ISL in a higher educational setting for adult learners further supports the creation of accountable ISL programming and coursework that encompasses sustainable credibility and opportunities for lifelong learning. Such outlined frameworks are applicable, if available.

As identified by Bringle (2009), in order to move scholarship in the ISL field forward, further research is required. This study explores the patterned thoughts and actions related to the beginning groundwork of the creation and advancement of an ISL initiative at a Catholic university in south-central Texas. The research focuses on the university's civic leadership office and the

actions that took place as it organized to spearhead and launch one of its first pilot ISL initiatives. Deriving from John Dewey's historical theoretical works related to service-learning theory and his early 20th century philosophies of democratic and experiential education (Crabtree, 2008; Plater, 2011), which emphasizes learning, reflection, citizenship, and community (Giles & Eyler, 1994; Plater, 2011), this study seeks to discover the phenomena of the beginning processes of an ISL program before it is designed and executed. The study also takes into consideration higher educational fieldwork and its studies in curriculum paradigms, calling attention to practices of internationalization, study abroad, service-learning, and planning for adult learners. For this case, an adult learner is defined as a student attending and taking coursework at an institute of higher education. Employing interviews, archived organizational documents and records, and an insider's perspective, this research is designed as a qualitative intrinsic case study (Stake, 2005). It makes visible the complexities of the multiple mechanisms and progressions involved prior to ISL program and course development by exploring the relationships among the varied informational sources.

To provide a broad view important to the study's topic, this investigative project begins with a synopsis explaining the intentional, relational ties between international educational experience and service-learning in higher education in the U.S. Next, the background, status, and suggested research expansions of the ISL field are presented as a context of evidence for the research problem, purpose, and overarching research question, which are associated with the study's implications and significance. Theoretical perspectives, a conceptual framework, and a summary of appropriate methodology for this study are presented in the following section. Finally, this chapter, the first chapter of this study, concludes with a personal statement, background of the researcher, and a review of the introduction for the research project.

## **Overview of Topic: Purposefully Combining International Educational Experience Abroad With Service-Learning in Higher Education for Adult Learners**

Higher education is a tertiary level of schooling that primarily serves adults. The centrality of education and training programs for adults varies by the mission and goals of the sponsoring organization (Caffarella & Daffron, 2013) and stresses the importance of lifelong learning (Merriam, Caffarella, & Baumgartner, 2007). Thus, looking at ISL initiatives within these parameters involves meeting the satisfactions of the demands of higher education and adult learners. These demands run through the vein of a concurrent theme, and that is the outcome of change. Change is a developmental process that takes place over time, within experiences, and from interactions among many. Programming in higher education aims to organize tangible and feasible plans that transfer learning gradually and considers contextual factors (Caffarella & Daffron, 2013). Processing the experience offered by these programs is an avenue to allow for learner metamorphous, the change within students. Aligning education to meet the anticipated outcomes of students entering the realm of the everyday is fundamental.

Education was established as a public issue during the 20th century (Boyask, 2012). Reciprocally, public issues are a part of education. Academia and the functional world outside of its walls are presumed to relate to one another. The purpose of higher education is to support the public by offering its resources to address societal problems, issues, and suffering (Chisholm, 2004). There is a sense of civic responsibility that creates a bridge between students and the public.

Schooling at the post-secondary level is a system for generating a labor market that can meet the uncertainty, quickness, riskiness, complexity, and interdisciplinary nature of the times and environments (Henard & Roseveare, 2012). Students are to be academically inclined, prepared for their profession, and aware of shared matters by mastering how to walk that fine line that blends two worlds. Graduates from post-secondary institutions are expected to have cognitive and

interpersonal skills, values, attributes, and high levels of knowledge, and the ability to navigate and thrive in a global economy and workforce while understanding, appreciating, and working cooperatively with those from differing cultures and nations (Chisholm, 2004; Henard & Roseveare, 2012; Kuh, 2008). As constructed to achieve these suppositions, those with higher institutional degrees are expected to be thriving citizens of the world.

Sperandio, Grudzinski-Hall, and Stewart-Gambino (2010) urge a review of higher education curriculum to include civic engagement commitment, social responsibility, and global stewardship. Instruments used to carve this passage are curricular, co-curricular, and pedagogical practices, which are eclectic, coming from many sources of information, methodologies, and epistemologies (Chisholm, 2004; Jacoby & Brown, 2009) that must possess an intent to plan for teaching and learning with a purpose (Kuh, 2008). Well-defined, coordinated links from specifically targeted learning outcomes to high-impact practices—as means to goals—construct “purposeful pathways” (Kuh, 2008, p. 8). One such conduit is ISL.

If thought out thoroughly and planned with integrity, ISL is a revolutionary pedagogical intervention having the capacity to support global scholarship and research, practical experiential learning opportunities, and civic engagement that answers the demands of higher education and student preparation (Chisholm, 2004). ISL is multifaceted, having many dimensions, as seen in Figure 1. Essentially, it ties international education, study abroad, and service-learning to a single point (Bringle & Hatcher, 2011; García & Longo, 2013) that has foundational reciprocal elements (Bringle & Hatcher, 2011; Jacoby & Brown, 2009; Porter & Monard, 2001) in students, the community served, and the service-learning process (Tonkin, 2011). At this point, the involvement of various entities presents opportunities for new interactions, methods, and systems. The

educational pedagogy is mutually beneficial to those involved and promotes progressive relational connections while interlocking the engagement of principled characteristics.

<u>Reciprocity</u>	<u>Educational Pedagogy</u>	<u>Advancing</u>	<u>Engaging</u>
<ul style="list-style-type: none"> <li>• Students</li> <li>• Community Served</li> <li>• Service-Learning Process</li> </ul>	<ul style="list-style-type: none"> <li>• Extensive</li> <li>• Robust</li> <li>• Distinctive</li> <li>• Transformational</li> <li>• Preps 21st Century Global Citizens</li> <li>• Drives Internationalization</li> <li>• Relevant and Important</li> </ul>	<ul style="list-style-type: none"> <li>• Networks</li> <li>• Resources</li> <li>• Support</li> <li>• Promotes Cultural Knowledge, Awareness, and Sensitivity</li> </ul>	<ul style="list-style-type: none"> <li>• Practical</li> <li>• Essential</li> <li>• Moral</li> <li>• Ethically Responsible</li> </ul>
(Bringle & Hatcher, 2011; Jacoby & Brown, 2009; Porter & Monard, 2001; Tonkin, 2011)	(Bringle & Hatcher, 2011; Plater, 2011)	(Amerson & Livingston, 2014; Crabtree, 2013)	(Budny and Gradoville, 2011)

*Figure 1.* The many facets of ISL. Listed are the characteristics of ISL. These four connected tables categorize them, to summarize the dimensions found within ISL.

With its unique combination of characteristics, ISL is an educational pedagogy allowing for edifying growth, which is extensive, robust, distinctive, and transformational (Bringle & Hatcher, 2011), especially in promoting cultural knowledge, awareness, and sensitivity (Amerson & Livingston, 2014). ISL is indispensable and is a necessary tenet in higher education and adult learning. Some researchers, such as Budny and Gradoville (2011), view ISL as a practical, essential, and morally responsible way to engage and prepare students to be 21st century global citizens who are active (Bringle & Hatcher, 2011) and interconnected with the world (Plater, 2011).

Considering higher education's responsibilities, ISL is a powerful implementation that has the potential to achieve the overall goals desired for graduates ready for post-educational life. According to Cafferella and Daffron (2013), the five primary purposes for adult education and training programs are to:

- inspire ongoing growth and development;
- aid students to handle real-life situations outside academia;

- train students for employment and professions;
- help organizations achieve goals and evolve to meet current demands; and
- foster the relationship between community, societal issues, and positive changes that encourage civility for the common good.

Through ISL within higher educational practices, students gain the knowledge, skills, and attitudes imperative for operating in worldwide environments that change, interconnect, and are interdependent. Other benefits include the advancement of new networks, resources, and support (Crabtree, 2013). ISL is multilayered. Thus, ISL is a medium to support student educational degree programming and learning that propels internationalization of higher educational practices and curricula, making it more relevant and important for U.S. colleges and universities (Plater, 2011). There are many benefits that ISL naturally incorporates, and it inherently blends with curricula that supports adult learners.

### **Context for the Study: ISL Background and Status**

Brown (2005) recognized that incorporating an international slant to service-learning offers a new, promising teaching-learning approach, and García and Longo (2013), more recently reaffirm this. Students capable of working on local and global issues meet President Obama's 2009 challenge to seek improvement to the quality of life for people in and beyond American borders (Van Cleave, 2013). ISL is a 21st century pedagogical practice (Bringle & Hatcher, 2011; Plater, Jones, Bringle, & Clayton, 2009) preparing learners to be internationalized, have a civic consciousness, and be socially competent (Van Cleave, 2013). Additionally, ISL advocates the interrelatedness of local-to-global commitment (Brown, 2005). Crabtree (2008) describes ISL as novel to academia, despite being rooted in other areas of study. MacKenzie (2013) further states that the ISL field is

“groundbreaking” and the “wave of the future” (p. 156). Since the subject is still “premature” (MacKenzie, p. 156), there is much work to do.

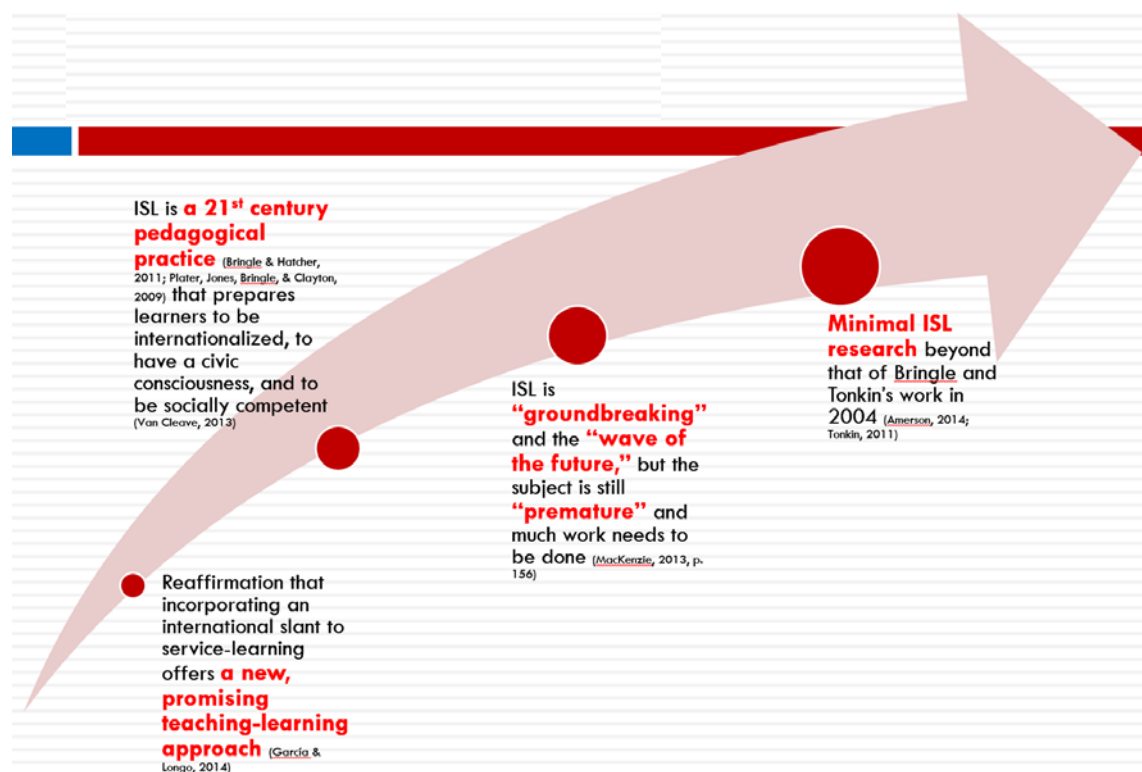
Bringle and Tonkin (2004) set one of the first prominent ISL research agendas during the early 2000s. About a decade later, service-learning research, in general, increased notably (Bringle, 2009). ISL mainly focused on university angles and program description. In 2011, *International Service Learning: Conceptual Frameworks and Research*, a book of discipline experts edited by Bringle, Hatcher, and Jones (2011), called greater attention to bringing stronger empirical evidence to ISL scholarship. These previous contributions guide ISL investigations, such as mine, while providing a frame and deeper erudition.

Considering ISL’s recent history and current position, as seen in Figure 2, delving into this particular research project offers pragmatic, empirical input to the discipline. Through the work that I have done, I see ISL’s past, its shortcomings, and where it may grow. Despite working in ISL research, I have not found empirical records that directly study the procedures that take place prior to ISL design nor link ISL planning directly to adult learners. At this point, gaining in-depth knowledge on the initial stages of ISL development in a higher educational setting for adult learners through a case study further progresses ISL’s status. The findings from this study enhance existing models and practices by exclusively targeting the process of ISL development before design.

**Suggested expansions of ISL research.** Salisbury (2012) states that there is a desire to have more evidence-based practice in education and an emphasis on prevailing good practices. This statement is directly linked to the same push in ISL. McBride and Mlyn (2012) state that international volunteer programs and ISL courses offered by American colleges and universities are greatly served by research that is in conjunction with practice. They are complementary to one protocol with empirical substance exists for assessing ISL experiences. Exploring ISL preliminary



stages is helpful in creating research-based assessment and impact considerations, as another. It is necessary that ISL is purposeful; thus, having project and program level research and assessment is a dire component (Crabtree, 2008). Yet, Kiely (2005) declares that no standard



*Figure 2.* Recent ISL history. Presented are the four points that provide a context for this study by providing ISL's current background and status. It shows how ISL is still a novel concept and in need of more research, especially in the area of planning.

suggested by Jones and Steinberg (2011). My exploration heeds McBride and Mlyn's advice to represent the intentions to do good because it aids ISL design development grounded in evidence and founded in real world issues stemming from a researched experience.

This research further adheres to other study recommendations. Tonkin (2011) suggests ISL research extend to include effective structured preparation. Kiely (2005) more specifically supports rigorous assessment protocols, including a study on pre-departure. Howe, Coleman, Hamshaw and Westdijk (2014) advance this position by affirming there are few accessible models to direct practical

plans and discussions. Nilsson et al. (2014) contend that a well-organized international initiative is valued and supports internationalization of higher education, enabling students to extract the most from their global exposure and contributing to a growth of their professional skills.

Howe et al. (2014) agree that creating guidelines for suitable performance benefits ISL design, but a single model is not universal. With differing goals and levels of importance of international dimensions, Edelstein (2014) argues that more needs to be known about systematic international learning and programming, and institutional level objectives. Moreover, academia is to think beyond itself. Service experiences should focus not only on higher education and student development, but balance the contributions to the communities served, in partnership (Erasmus, 2011; McBride & Mlyn, 2012; Tonkin, 2011) and with input from the region where the service is conducted (The Chronicle of Higher Education, 2011). Crabtree (2008) advocates more research to fully understand the underlying forces and effects of ISL by integrating community perspectives. In order to carry out ISL ethically and responsibly, it is imperative for those involved to build relationships, comprehend the history and comparative ideologies of partnership development, and analyze the contexts where the work is done (Crabtree, 2008; Porter & Monard 2001).

### **Problem Statement**

In general, it is assumed that learning for students in higher education will quickly and automatically be applicable through programming, without concerted efforts and sufficient timing for planning (Caffarella & Daffron, 2013). ISL is seen as just another program. As such, ISL planning covers the essential program implementation logistics, which overlook environmental scans or feasibility studies (Tonkin, 2011). Understanding ISL program development and structure is considered to be superficial. ISL activities and program self-descriptions, as well as student and community partnership effects and rationale, overshadow considerable empirical perspectives,

cumulative impact, measurement, evaluation, and theory (Jones & Steinberg, 2011; Kiely & Hartman, 2011). There are holes in the broader picture. The reality is that planning programs is messy and challenging (Caffarella & Daffron, 2013).

When planning for ISL, there are many dynamics involved, ranging from social aspects to operational factors. Salisbury (2012) argues that future research projects of qualitative research in education need to recognize the pedagogic spaces that are mediated through teachers, trainers, and other social actors involved in the learning process. There needs to be more focus on understanding the interactions among those involved. Additionally, the social nature of learning also requires a deeper look when considering qualitative research in education (Salisbury, 2012). ISL lends itself to exploring alternative pedagogical spaces and social aspects of learning.

Direct investigations to substantiate ISL are needed, as few disciplines or studies apply and detail in-depth accounts, research design, methodology, and analysis (Kiely & Hartman, 2011). Little ISL research exists that is based on previous empirical recommendations or even connects theoretical implications for practitioners. Knowledge to understand the complex, yet, vital dynamics that enlighten ISL development, operations, management, and outcomes is lacking (Crabtree, 2013). The bridge that joins civic engagement and internationalization has gaps (García & Longo, 2013). Questions still lie in the structure of ISL experiences (Jones & Steinberg, 2011). Thus, this research project provides a glimpse of the initial planning process of an ISL pilot initiative under development that is within the context of working with adult learners in higher education in the U.S.

### **Purpose of the Study**

The purpose of this research is to explore the initial planning process and development of an ISL initiative for adult learners within a U.S. higher education context. This research delves into the considerations, planning, actions, and discussions stakeholders grapple with by collecting

information from actors who are responsible for an ISL movement at a Catholic university in south-central Texas and their host community service site in the area of Chimbote, Peru. It investigates an ISL team as it developed one of its first ISL experiences. The investigation makes visible the multiple perspectives involved in the collaboration, including an aspect from the communities both serving and being served, and constructs the process of what occurred in this phase of planning. The research explores the process before an ISL program is designed and implemented.

### **Research Question**

The study sought to discover and describe the planning process of ISL before design and implementation. The following is the overarching research question that was addressed in this study: What is the initial planning process of an international service-learning (ISL) initiative under development that involves a collaboration among a south-central Texas private university and a ministry of Catholic sisters in Chimbote, Peru?

### **Significance of the Study**

This investigation brings out the aspects of ISL design plans for adult learners in higher education before implementation. Since ISL is still considered innovative (Crabtree, 2008; MacKenzie, 2013) and becoming more prevalent (Bringle & Hatcher, 2011), a high alert must be given to its formation. Planning a design for programming becomes more of a necessity for new, quality ISL programming. Henard and Roseveare (2012) adamantly state that innovation “needs careful pre-implementation scrutiny and ongoing monitoring for unexpected drawbacks” (p. 33). Innovations such as ISL could possibly become a catalyst for unintended or unexpected ramifications, or negative impacts, or may conceivably fail if particular considerations are not carefully thought out or agreed to, such as cause-and-effect factors and alterations to related policies and practices (Crabtree, 2013; Henard & Roseveare, 2012; Tonkin, 2011). Methodical program

planning creates a framework to reach intended, targeted goals that are more likely to be reached. This is because a guide is in place. The guide oversees all steps. Monitoring, evaluation, measurement of impact, and teaching-learning outcomes are required because of the unknown effects (Henard & Roseveare, 2012) and uncertainty (Caffarella & Daffron, 2013). From beginning to end, an ISL initiative can have all parts threaded together. Checks and balances are also indispensable to examining new pedagogical practices for integrity, morality, and ethics (Bringle & Hatcher, 2011; Tonkin, 2011).

One way to address the concerns of ISL innovation is through design analysis. ISL designs vary in many ways, including structure, logistics, purpose, and goals, and thus render different outcomes (Tonkin, 2011). The range of ISL designs have degrees of strengths and constraints, which are ideally addressed before implementation (Jones & Steinberg, 2011). As such, it is important to parallel program design with expected learning and service outcomes during the planning stages (Tonkin, 2011). Other basic design considerations suggested by some ISL experts (Jones & Steinberg, 2011; Tonkin, 2011; Whitney & Clayton, 2011) include assessment, reflection, culture appropriateness, relationships, activities, actors involved, time, intensity, roles, responsibilities, population served, setting, and outcomes. By focusing on ISL antecedents, ISL objectives avoid unintended consequences (Crabtree, 2013) and clarify goals (Tonkin, 2011). Additionally, having a trustworthy model of the planning process for adult learners with procedures and materials needed is a solution for planning ISL programming within the context of tertiary education (Caffarella & Daffron, 2013). It is like an elementary teacher's lesson plan. There are prepared standardized categories for teachers to frame their lessons, but room for individualization, modifications, and accommodations, depending on the specific classroom of students.

For the majority of individuals responsible for ISL, the progression of planning tends to be more like “a mass of decisions, political maneuverings, negotiations, details, and deadlines than precise and clear steps of what should be done, when, where, by whom, and how” (Caffarella & Daffron, 2013, p. 9). However, the planning process, especially for the beginning actions of initiatives under development, is interactive. As Wilson and Cervero (1996) put it, “planning work is people work” (para 1). Further, it is not about constructing the program, but how the program is constructed (Wilson & Cervero, 1996). Those involved and responsible for educational program planning in higher education typically have distinctly defined roles and responsibilities as trainers and program planners, and may even carry official titles (Caffarella & Daffron, 2013), though planners may go beyond and serve in various capacities, maneuvering many moving pieces simultaneously. Wilson and Cervero see planners’ significance in their technical activities and in their influences in political and ethical positions. Thus, this research helps others involved in similar capacities with decision making and preparation for pragmatic issues they may encounter. The study helps those interested in ISL and related fields to recognize the multiple viewpoints, desired goals, and objectives that come from a team responsible for initial planning.

ISL development is derived from a holistic perspective shaped by individual actors cooperating. This is an opportunity to present higher educational institutions and the outside community as one, rather than two separate participants, and highlight local engagement and global connections, as referenced by MacKenzie (2013). Beneficiaries of this work are the multiple stakeholders involved in an ISL endeavor. As stated by Caffarella and Daffron (2013), “Education and training programs for adults are planned and coordinated by people in numerous roles who have varied backgrounds and experiences” (p.3). More specifically, this is a resource for those who are ISL developers, decision makers, and policy makers within higher education and the partnering

organization and communities-at-large. It is those who are involved in planning programs that are responsible for the change in the way students think and act (Wilson & Cervero, 1996).

Despite the established ISL literature (Amerson, 2014; Berry & Chisholm, 1999; Bringle et al., 2011; Crabtree, 2013; McBride & Mlyn, 2012), many areas of the field still warrant answers (Kiely & Hartman, 2011). More research, quantitative and qualitative, is needed (Kiely & Hartman, 2011). Qualitative research, specifically, provides a unique window to view an ISL planning process. As supported by Salisbury (2012), qualitative methods unearth and make visible what conventional surveys cannot. Further, Salisbury argues that qualitative research illuminates the what, why, when, and how of apprenticeships and vocational education and training. There is opportunity to discover key research questions that provide knowledge of matters anticipated and those that are unexpected (Salisbury, 2012). Since more initial research for ISL is needed, the purpose of qualitative research is appealing and can be used as the preface to other future high-quality investigations.

This study of the process of an ISL program for adult learners that is under development adds to the literature by providing insight into the beginning stages of design, where the foundation for implementation is set. This review process and the research mechanisms involved permit the attainment of knowledge about ISL so as capture results that may define a unique set of “ISL Principles of Good Practice” (Kiely & Hartman, 2011, p. 310). It provides an opportunity to see how those involved with ISL interact and plan. Conclusions indicate how diverse undercurrents are at play during the beginning stages of ISL, which ultimately affect all phases of ISL, beginning to end.

### **Theoretical Perspectives and Conceptual Framework for the Study**

Practice and theory shed light on various issues, stances, and insights. Together, they have a cooperative nature, much like ISL and its combining facets. This exchanging disposition between

practice and theory guides the perspective in which to view the subject or study identified. The planning process of an ISL initiative, as a practice, couples with a range of theoretical perspectives, but largely is rooted in John Dewey's educational concepts.

Dewey is an American noted for his many contributions in the areas of philosophy, education, reformation, and theory. He believed that education should be a direct, physical human interaction gained through experience and inquiry (Giles & Eyler, 1994; Plater, 2011). Dewey (1938) states that there is an "organic connection between education and personal experience" (p. 25). Further, Dewey says that "education is essentially a social process" (p. 58) and in its broadest sense the means of "social continuity of life" (p. 5). Yet, all experiences do not necessarily amount to education.

There is a clear distinction between the indirect education and learning one gets from the mere existence with others, and the formal, intentional education and learning of the young (Dewey, 2012). Intelligent theory of experience in relation to education, or as Dewey (1938) refers to it, "philosophy of education" (Dewey, 1938, p. 51), must be framed by two principles, interaction and continuity, to form quality experiences that are of value and educational significance (Dewey, 1938). Learning from experience that attains Dewey's philosophy of education must come from "a genuine community life" (Dewey, 1938, p. 56) in which the work done comes from a social enterprise of those involved and is thoughtfully planned ahead. It is important to plan because of the individual contexts that may present themselves. The advanced planning must have a sense of routine and flexibility (Dewey, 1938) and awareness of the potential split between experiences and school requirements (Dewey, 2012). There is a balance and there are pre-emptive considerations. This is because the leader teaching a group carries the responsibility of knowing the learners and the subject matter that correlate to the activities that enable social organization in which all participants are



engaged and have some ownership (Dewey, 1938). Thus, the preparation must match the goal of the group to the experiences that are being formed. The aims in education emphasize the notion of preparation and the method of how an experience develops for both educator and pupil (Dewey, 2012).

Despite the organization needed for education, there is also a need for flexibility. What is acceptable as proper preparation and quality experiences for education is decided by a group or community. It is through the freedom of having the opportunity to have varied experiences and interactions for all individuals that creates democracy in education. According to Dewey (2012), as a “social function” (p. 88), educational standards and methods will be different. Yet, it is in that freedom for every individual to have multiple contacts that allow for the exchange of ideas and learning, creating “a greater diversity of stimuli” (p. 94). From this “social process” (p. 106), is the ability to choose to change and to readjust in an orderly manner. As Dewey states, democracy is “primarily a mode of associated living, of conjoint communicated experience” (p. 94).

As a theoretical perspective in this study, I am using Dewey’s historical and foundational theoretical works related to his early 20th century social philosophies of democratic and experiential education (Crabtree, 2008; Plater, 2011), which emphasize learning, reflection, citizenship, and community (Giles & Eyler, 1994; Plater, 2011). This is an appropriate theoretical perspective to apply due to my focus on the process of planning for an ISL initiative under development. Dewey (1938) states “... all human experience is ultimately social: that it involves contact and communication” (p. 38) and “... does not occur in a vacuum” (p. 40). It is through the interface, lived occurrences, and reflection that learning transpires and community is established (Giles & Eyler, 1994; Plater, 2011). The sense of community or group is created through a bond of shared engagement, synced within the same environment, at the same time, and with the same activities

(Giles & Eyler, 1994; Plater, 2011). Not only is the shared experience important, but so is the “process of transmission” (Dewey, 2012, p. 6). The process of transmission includes “communication of habits of doing, thinking, and feeling” (Dewey, 2012, p. 6). There is an exchange of “common understanding” (Dewey, 2012, p. 7) between people. Learning experiences in and with the community become reciprocal, authentic, intimate, and meaningful (Plater, 2011). There is a connection between the experience of doing with a consequence that follows (Dewey, 2012). Although not the central purpose, if planning for ISL is collaborative, community may be established (Plater, 2011).

With this case, I tether a group of people to a certain lived experience. All prepared, to some extent, an ISL pilot that served as an element to develop for future considerations for programming and course credit for adult learners. My inquiry is on the interactions and continuous knowledge gained through the experiences shared and explored. Those involved in the study form a bond through the shared engagement in this developmental phase of ISL. The entire case is blanketed with the Deweyan spirit.

Further, Dewey incites the importance of uniting such declarations with empirical work. Empirical work is a means of evidence to plan, and in this study a plan for ISL. Dewey (1938) stresses the importance of having a plan that outlines orientation, goals, and operations. Going through the planning processes carves out time to think through actions before they take place. It is “a plan of operations” (p. 5) and “intellectual organization” (p. 31) through empirical sciences that weave ideas and actions together, developing a deeper and more inclusive understanding (Preface). This avoids acting upon impulses. When impulse connects with other possible tendencies to action, “a more comprehensive and coherent plan of activity is formed” (p. 64). Researching the initial planning process of an ISL initiative under development, as seen here, allows for time to pause and

reflect. Reflection, in this sense, is constructed upon observation and the recalling of happenings, leading to findings that promote power of self-control and to frame purposes intelligently, which is the target of education (Dewey, 1938). The target then influences educational institutions' views and actions on change and paradigms to implement. The power also leads to wise judgment, evaluation, and choice to select pathways to reach the ends in operation (Dewey, 1938).

To coincide with the theory for this study, the concept framing my research is Pechak and Thompson's (2009) Conceptual Model of Optimal International Service-Learning. Although geared towards the field of physical therapy, I am applying it generically to the general ISL discipline, as seen in Figure 3. The original model was adapted to more appropriately adhere to the focus of this study, which emphasizes the planning process and its role throughout the different phases of ISL. Notice the Outer and Inner Cores of the Essential Core Conditions. These are the people and concepts that relate closely to planning processes of programs for adult learners. Using this conceptual model for a framework pinpoints the area that my study affects and demonstrates the influence of my research.

Pechak and Thompson's (2009) Conceptual Model of Optimal International Service-Learning consists of four phases divided by two sides, plus one additional phase. The bilateral sides are the Essential Phases and the Essential Components of Phases, respectively:

- (1) development – partner understands other partner's role and community identifies needs;
- (2) design – explicit service and learning objectives;
- (3) implementation – reflection, preparation, and risk management;
- (4) evaluation – service and learning outcomes measures; and
- (5) enhancement.

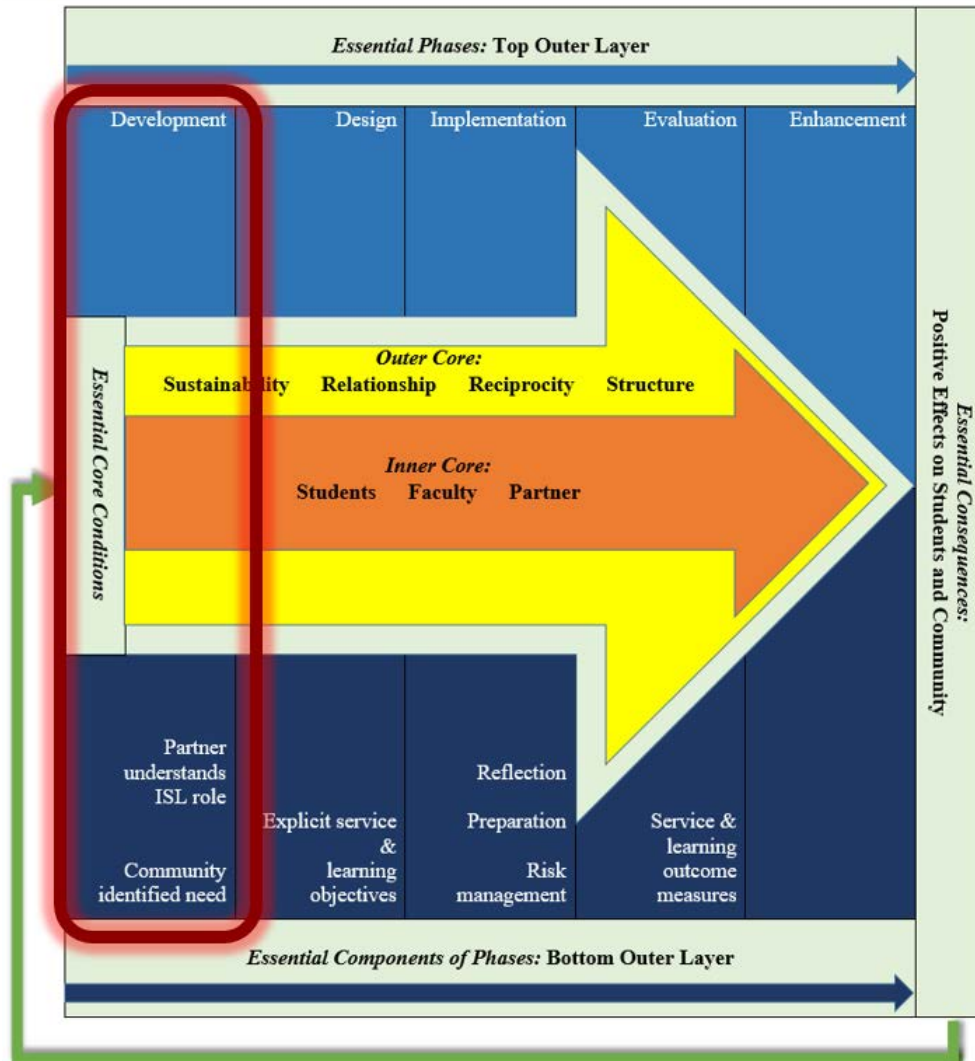


Figure 3. Adapted version of Pechak and Thompson's (2009) Conceptual Model of Optimal International Service-Learning. This is an adaptation of the original model due to restricted copyright. However, the figure still demonstrates the identified and described components of the original figure and serves to demonstrate the phases of ISL in general and the conceptual framework for this specific study, which focuses on the developmental or initial phase of ISL that incorporates the planning aspect.

Like a triangular log in the original model, the Essential Core Conditions run through the Essential Phases and the Essential Components of Phases, filling the model's middle. This section is a dual core. The inner core makes up the people involved in ISL, students, faculty, and partner. The outer middle core consists of the concepts of sustainability, relationship, structure, and reciprocity. The last modular component is the Essential Consequences, and positive effects on students and the

community. It is located separately after the enhancement phase, looping to the beginning into the dual core and starting phase.

### **Summary of Methodology for the Study**

My dissertation research is a qualitative design modeled after Stake's (2005) intrinsic case study. With this approach, there is a need to develop and explain the complexities within the process of planning the development of ISL. A case study is a qualitative research methodology in which investigators emphasize the detailed exploration and description of single entities, individuals, small groups, or phenomena, becoming the case under investigation (Becker, et al., 2012; Kiely & Hartman, 2011). My study concentrates on exploring a case at a Catholic liberal arts university in south-central Texas in order to interpret and re-present participant experiences through interviews, along with the use of archived organizational documents and records and an insider perspective (Allwright, 2005; Bishop, 2005; Insider/Outsider Perspective, 2007; Jain, 2013).

Concerning the participants of the study, I employed Maxwell's (2013) purposeful selection. This technique allowed me to have participants who complemented and were relevant to my study's questions and goals. I identified nine participants who fit at least one of the following criteria:

- participant in the Peru 2015 trip;
- identified as organizational and ISL development leaders;
- contributed to the planning process of the Peru 2015 trip; and
- coordinated the ISL experience.

To access participants for study, I contacted the organizations in the host country, university faculty and staff, other partnering organizations, and ISL participants. A snowball sampling technique was unnecessary since the desired number of participants took part in this study. Additionally, I incorporated voices from the differing perspectives, including from the university and the

community. The emphasis was on those who provided an insight to the process of developing the ISL pilot initiative.

As a tool for collecting data, I interviewed participants using semi-structured questions in November 2016 and December 2016. I implemented pre-scripted questions based on Brinkmann and Kvale's (2015) questioning guidelines and Maxwell's (2013) outlines of a dissertation proposal as an inquiry guide for participants in the case study. I added further inquiries based on the conversations between the interviewees and myself (see Appendices C and D for the specific interview questions). Exploration of the participants' perspectives and experiences illustrated the process of planning that takes place while developing an ISL pilot initiative, and more specifically, provided understanding of the collaboration between a south-central Texas private, liberal arts university and a ministry of Catholic sisters in Chimbote, Peru.

Interviews took place at locations most convenient to the participants and were conducted in person and one-on-one. The primary location for most interviews was at the university, including participants' offices or somewhere on the campus grounds. Peruvian partner interviews were through Internet-based communication platforms, such as WhatsApp, Skype, and Facebook Messenger, due to distance. Both Peruvian partners had appropriate accounts and carried out similar communication exchanges in this manner in the past. I speak Spanish fluently and speaking Spanish was a part of my regular tasks with the university's civic center. Therefore, as the two Peruvian participants' first language is Spanish, I conducted these interviews in Spanish. All interviews were documented through fieldnotes (Corwin & Clemens, 2012; Forsey 2012; and Lichtman, 2013;) and audio recordings (Forsey, 2012; Hammersley, 2012). The later interviews were recorded with a digital recorder and initially transcribed live using Google Voice Typing. The early interviews were also later transcribed using Google Voice Typing. All transcriptions were reviewed

multiple times, having accuracy checked and text copied as message units (Skukauskaite, 2012) onto an Excel spreadsheet. After completing initial interview transcriptions, participants had the opportunity to review their information, to add any further material, and to check for accuracy of understanding as part of “member validation” (Brinkmann & Kvale, 2015, p. 222), also known as “respondent validation” (Maxwell, 2013) or “member check” (Sandelowski, 2012).

Written sources and other organizational archives that were used for the planning process from 2014 through 2015 (prior to the trip that started December 7, 2015) are a second data collection set for this study, including group meeting notes, organizational reports with pre-reflection information, bounded and electronic planning records, PowerPoints, emails, and other media sources. Most documents were self-created since I was the lead coordinator for this particular initiative. All interviewees were offered the opportunity to share their own planning documents. Only one shared a document used for immersion travel trips, but not one necessarily for the trip under investigation. Additionally, I reviewed a personal planning and travel journal that contains logistical information, research notes, and personal reflections with reflexive components.

Data analysis utilized Spradley’s (1980) Developmental Sequence and Taxonomy for the interviews, in addition to a content analysis and applied techniques recommended by Huckin (2004) for the supplemental written sources. Through Spradley’s Developmental Sequence and Taxonomy, I looked for included terms from the transcribed interviews and came up with a term from my notes that fit a semantic relationship as a cover term, and ultimately, derived to a classification of meaning as a taxonomy (Spradley, 1980). For content analysis, I followed the methodological procedures outlined by Huckin:

- (1) pose a research question;
- (2) define the appropriate construct(s);

- (3) select an appropriate text or body of texts as the study corpus;
- (4) determine appropriate units of analysis (text features);
- (5) gather data; and
- (6) interpret the findings.

Since the purpose of a case study is to understand the case as one unit (Baxter & Jack, 2008), I cross-referenced the outcomes of the sources to represent discovered themes.

To safeguard the fundamental research ethics principles and preserve empirical research, I followed the American Educational Research Association (AERA) Standards (2006) and triangulation throughout the study, as stated by Stake (2005). Appropriate procedures, such as IRB and signing consent forms (see Appendices A through F), took place before conducting the interviews and prior to any other interactions. Steps to protect participant confidentiality were also taken, as well as member-checking.

To ensure good faith and credibility, I identified my views on the topic and bracketed them (Lichtman, 2013) during the interviews. This was done as part of the introduction with my participants and throughout my research process with reflective journaling. My views were also bracketed during aspects of data analysis and writing, avoiding risk or bias for participants during the interview process. Bracketing is a normal part of situating the researcher's bias in a formative sense.

The nature of my research is qualitative. A standard practice of research and empirical studies is to state limitations. As such, some may see the nature of a case study, the network involved, the context, and the small interview pool, as limitations. Information was limited to the representatives and their reflections, including myself and my dual roles. Another perceived limitation may be the lack of generalizability of my research. Even so, this research and all its parts



are unique, thus, adding to the body of knowledge. The trustworthiness instilled in my study restricts the seeming limitations. All data gathered was reviewed thoroughly, following appropriate qualitative research protocol. Each process of this research lays out, in detail, transparent rationales. After conducting interviews and reviewing the data, I do not regret including other specific questions that could help address an issue in the ISL process that emerged later in the study. The structure of the interviews allowed for natural conversation to take place and authentic responses to be made. Anything that emerged after the interviews only supported or negated themes. The only limits I see in this study are those that the context bounds and the additional avenues left unexplored. Final conclusions and recommendations for future research written in chapter five address ways to unleash limits.

### **Personal Statement and Background of the Researcher**

The idea of an ISL program was planted during the university's center for civic leadership's inception in June of 2013, but first manifested itself when an exploratory trip took place in Peru after a year and a half of operation, in December 2014. My inquiry started as the center was appointed to lead the startup of the on-campus ISL programming, targeting the health professional schools. As the community partnerships coordinator for the center for civic leadership, I was directly involved in the development of this project. I had no international program development, design, or management experience prior to my work with the center, but I was the primary lead in the coordination of the Peru 2015 initiative. In March 2016, the university center hired a part-time global immersions coordinator. The new employee and I worked together, discussing partners located around the world.

## Summary

This chapter provided an overview and context for a problem addressed within the field of ISL. The most significant shift was focusing on the initial process of an ISL initiative under development and its impact on higher education's high-impact practices of diverse global learning and learning through service-learning and community work. Although existing literature has provided narratives on ISL, most material is focused on program implementation and its outcomes. More research is needed on what happens even before the programs for adult learners are designed.

The dissertation addresses the gap in the research of the lived experiences of participants involved within the case study. The study invited participants to share the stories, along with written documents to support those stories. The insights developed from the analysis of sources can be used to guide the future planning process of ISL designs for other institutions of higher education that desire the implementation of high-impact learning practices. The study was guided by relevant qualitative literature and research design and methodology, along with conceptual frameworks. The research looked at possible connections between the theoretical perspectives identified. Theory is an important aspect of practice.

To further this investigation presented in chapter one, a review of literature, chapter two, follows. Chapter two of the dissertation contains a review of the literature relevant to the general understanding of the field of ISL, which concentrates on two categories: (a) the history and conceptualizations of ISL, and (b) planning and designing for ISL and adult learners in higher education. It connects related research that explores ISL foundations and background, which supports the significance of doing qualitative research to discover further information on the initial planning process of ISL development. The methodology of my research is described in detail in chapter three.

## Literature Review

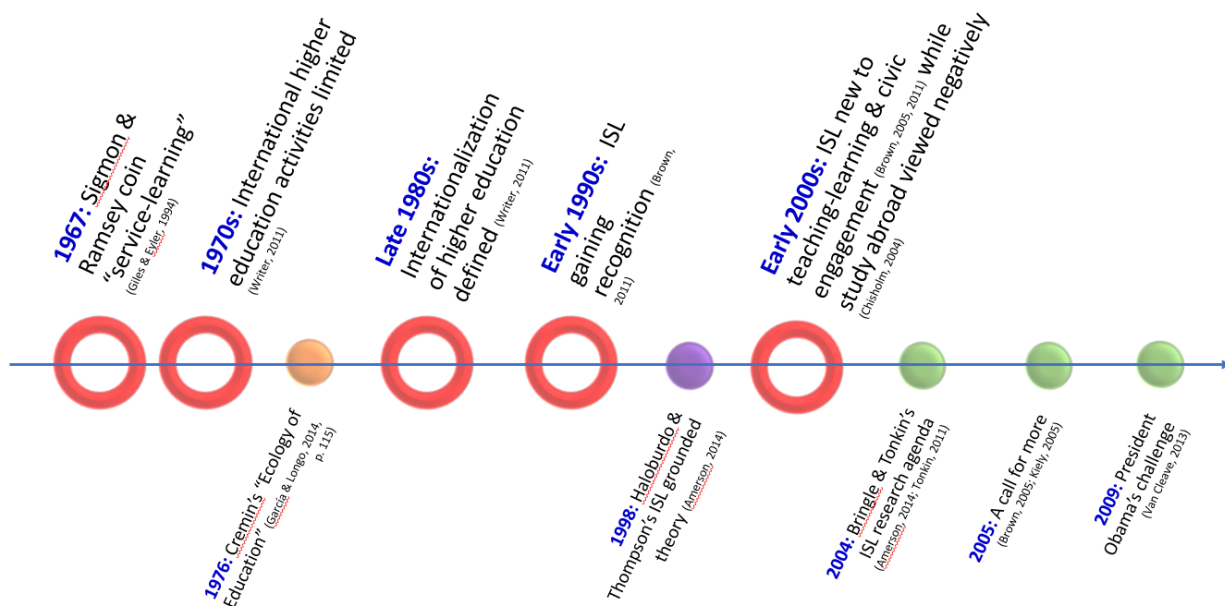
The Campus Compact and the National Survey of Student Engagement (NSSE) are two large scale surveys that respectively gather data regarding higher education community engagement and service, and students studying abroad. These types of higher education information sources touch on two major components of ISL: the internationalization of higher education and service-learning. While themes overlap, ISL is not recognized as its own standalone category. Rather, ISL components are blended with other topics. Internationalization of higher education, study abroad, and community engagement used to be seen as three separate entities, but changed as students' needs called for learning about working with individuals from globally diverse backgrounds (Brown, 2005). ISL will continue to evolve as empirical evidence in the field and all related areas increase. In doing so, higher education reports, such as the Campus Compact and NSSE, may consider recording ISL specific data.

Kiely and Hartman (2011) declare that extensive empirical work on domestic service-learning is established, even while lacking “the theory, practice, value, and use of ISL programs and courses” (p. 302). Although ISL research exists and has increased, Crabtree (2013) cites that there is still a need to understand the basic, multiplex contexts that “should inform program development at our institutions, operational choices of partners and sites, management of the dynamics of an ISL project as it unfolds, and the study of outcomes” (p. 52). More specifically, Jones and Steinberg (2011) state that how ISL is formed is still questionable, especially considering the various forms of how ISL may be structured. Quality designed ISL provides the education and development for people to increase their international civic skills while addressing needed resources for individuals and communities (Brown, 2011). By connecting theory with practice in exploring the process of planning an ISL pilot initiative under development under the context of adult learners in higher

education, the literature I selected for the following review addresses the themes of (a) history and conceptualizations, including definitions and theories, related to ISL, and (b) planning and designing for ISL in higher education and adult learners.

## How ISL Came to Be: History and Conceptualizations

Figure 4 indicates that, although the term “service-learning” was coined in 1967 by Robert Sigmon and William Ramsey (Giles & Eyster, 1994), it was not until the early 1990s, when educators gained interest in emerging international perspectives on academic learning, that ISL started to gain recognition as a field (Brown, 2011). Amerson’s (2014) foundational work in the ISL field provides a literature review on its research history. She cites Haloburdo and Thompson’s (1998) use of a grounded theory approach and names them as the founding researchers in the ISL discipline. During the early 2000s, the movement of internationalization to service-learning was new to teaching-learning approaches and civic engagement (Brown, 2005, 2011). Tonkin (2011) declared that within



\*Study abroad is centuries old (Bringle & Hatcher, 2011)

Figure 4. Early ISL history. This is a timeline of the conceptualization of ISL, starting with when the term “service-learning” was first coined and up through the first decade of the 21st century.

the first decade of the 21st century, extensive research work done specifically on ISL was minimal beyond that of Bringle and Tonkin (2004). Amerson made a similar observation, emphasizing few publications on ISL from 15 years ago. More recently, according to Crabtree (2013) and Amerson, there has been growing popularity, interest, and literature involving ISL in higher education. The history of the community-engaged model of teaching and learning is charted, its best practices are identified, and its formulas for the future created by field researchers (Crabtree, 2013).

As ISL research emerges, so does ISL data collection. As Crabtree (2013) mentions, there is ample literature and sources of information focused solely on students (Dugan & Komives, 2010; Edelstein, 2014; Mills, Bersamina, & Plante, n.d.) and from the university angle (Campus Compact, 2013; Özturgut, Cantu, Pereira, & Ramón, 2014; Sattler, 2009; Sperandio et al., 2010; Stütz, Green, McAllister, & Eley, 2015). There are also many accounts that detail the experience itself and the impact on student learning (Amerson & Livingston, 2014; Bamber & Hankin, 2011; Nilsson et al., 2014), and some research on the implementation of ISL (Amerson, 2014) and on course design (Howe, Coleman, Hamshaw, & Westdijk, 2014). Howe, et al. (2014) state that there is a disconnect between educator and community expectations and actual student experiences, which is leading to a push to discover more effective practices when designing ISL programs. Consequently, Tonkin (2011) stresses that having clear focal points is necessary for an ISL program as antecedents to implementation.

Even before delving into ISL history and envisioning where the literature is going, it is important to understand the field's lexicon. ISL, thus far, is associated with various terms and phrases, but an ISL experience is a summation of many parts and warrants deconstruction. For my study, five concepts are detailed: internationalization in higher education, study abroad, service-

learning, international service-learning, and global service-learning. They are all interrelated, but carry certain independent nuances, as seen in Figure 5.



*Figure 5.* ISL related studies interrelations. This figure is a depiction of the overlapping relationships of the fields of study that are connected to ISL, emphasizing the growth and focus of ISL itself.

**Internationalization in higher education.** In the 1970s, international activities were limited in higher education, mainly tailored for prestigious groups, but over the last 20 years, the internationalization of higher education has become a core concept (The Chronicle of Higher Education, 2011). First defined in the late 1980s, the concept of internationalization has grown and is now widespread in Europe, and is more recently emphasized in Asia, Latin America, and the Middle East (The Chronicle of Higher Education, 2011). At the turn of the 20th century, higher education consortiums and platforms produced good practices for setting internationalization goals on campuses (García & Longo, 2013). Growth in international education was exponential throughout the first decade of the 21st century (Goodwin, 2009). U.S. secondary education sites are

advancing commitments to internationalize to meet the impact of globalization processes (García & Longo, 2013). The internationalization of higher education is inherent (Nilsson et al., 2014) because educational curriculum beyond secondary school calls for global stewardship (Sperandio et al., 2010) and is gaining more attention (Özturgut et al., 2014). One way that institutions of higher learning are promoting internationalization is through study abroad programming.

**Study abroad.** Study abroad is a chief strategy of colleges and universities to respond to the question of preparing students for civic responsibilities (Lewin, 2009). Study abroad is a form of civic engagement that is associated with the ideals of global citizenship (Hartman & Kiely, 2014a) and an innate philosophical foundation related to ISL (Jacoby & Brown, 2009; Plater, 2011). Its purpose is to discover newness outside of familiar environments and to assess home-based norms in atypical settings, allowing the opportunity to thoroughly examine and draw personal conclusions (Jacoby & Brown, 2009; Plater, 2011) through critical reflective practice and social concern inquiries (Hartman & Kiely, 2014a). However, Hartman and Kiely (2014a) state that study abroad does not always lead to increased worldwide social responsibility or global citizenship, even with the emphasis of service-learning methodology.

According to Goodwin (2009), America did not historically possess a global mindset. Most Americans are considered detached and ignorant of global matters (Goodwin, 2009) and U.S. undergraduate students are ill prepared for international challenges (Longo & Saltmarsh, 2011). During the turn of the 21st century, study abroad programs carried negative reputations, especially regarding bad behavior in students (Chisholm, 2004). Academia was charged with the responsibility for upholding rigorous standards for all students, regardless of the cultural setting for their studies (Chisholm, 2004; Jacoby & Brown, 2009). Those who influence study abroad programming and design are urged to more intently foster global learning and development (Hartman & Kiely, 2014a).

Study abroad needs vigilant and systematic integration more than ever because of the quick rise and record-breaking involvement in study abroad participation among U.S. students (Goodwin, 2009), tripling over the last 20 years (García & Longo, 2013; Hartman & Kiely, 2014a), and to avoid elitism and one-sided interests (Hartman & Kiely, 2014a). Ogden (2007–2008) is cited as advising study abroad, to deter modern educational neocolonialism and a bureaucratic higher education. This can be done by having U.S. students partake in transformative learning experiences and having them get out of their comfort zones to learn desirable outcomes in a way that can be tracked (Hartman & Kiely, 2014a). Transformative learning experiences are possible via service-learning.

**Service-learning.** Service-learning within a higher educational system is a type of effective pedagogical experiential education where students can participate in activities that are interconnected with social needs, while advancing educational learning and development (Bamber & Hankin, 2011; Brown, 2005, 2011; Eidson, Nickson, & Hughes, 2014; Longo & Saltmarsh, 2011). The goal of service-learning is to have students grow as leaders committed to lifelong service (Brown, 2005, 2011). Related to volunteerism (Brown, 2011), service-learning guides students by enabling them to recognize that their interaction with social issues is more than just a charitable act (Eidson et al., 2014) but is reciprocal in nature (Bringle & Hatcher, 2011; Jacoby & Brown, 2009; Porter & Monard, 2001). The community being served gives to the students as much as the students give to the community. With this, both the classroom and the community provide a systemic view, which promotes social justice, the realities of the world, and a sense of vocation (Bamber & Hankin, 2011; Mills, et al., n.d.). Learning is immediate, applicable, and active through practice via service and reflection (Brown, 2011). Service-learning is a tool that brings about effective, altruistic citizens (Dugan & Komives, 2010) who are not only motivated to learn and engage, but who also act and lead (Eidson et al., 2014; Mills et al., n.d.). Making connections to career, bringing awareness of



social issues, having feelings of enjoyment and community connectedness, and leadership efficacy are some results of service-learning participation (Dugan & Komives, 2010; Eidson et al., 2014).

In addition to the above benefits of service-learning, the chief factor in its success is a range of higher education support for civic and community engagement built into the general curriculum, which may include the delivery of logistical and financial support for community work, or the inclusion of alumni (Campus Compact, 2013). According to Campus Compact's 2012 survey report (Campus Compact, 2013), higher education institutions are increasing their interactions with the community at-large. Campuses are designating specific centers to be responsible for engagement activities to collect related data and to aid in associated institutional strategic planning. "The role of the civic engagement center is crucial in coordinating efforts across the institution to ensure both the quality and the efficiency of work in the community" (Campus Compact, 2013, p. 8). These centers are ideally situated to take on the role of providing institutions with service-learning programming and research development. Service-learning is more than a fad; it is a trend (Bringle, 2009). Also important for effective service-learning are connecting to the idea of formal study, having students understand the service agency where they will be working, familiarity with those associated with the community service site, and understanding the partnership between students and the service agency (Brown, 2011). Service-learning is effective locally and globally.

**International service-learning.** Over the last 20 years, ISL has grown in recognition as an opulent mode to develop a valuable education that provides international perspectives on academic learning (Brown, 2011). It blends the internationalization of the higher education movement with the surge for civic engagement (García & Longo, 2013). An established definition for ISL as a curricular experience, as seen in Figure 6, is:

A structured academic experience in another country in which students (a) participate in an organized service activity that addresses identified community needs; (b) learn from direct

interaction and cross-cultural dialogue with others; and (c) reflect on the experience in such a way as to gain further understanding of course content, a deeper understanding of global and intercultural issues, a broader appreciation of the host country and the discipline, and an enhanced sense of their own responsibilities as citizens, locally and globally. (Bringle & Hatcher, 2011, p. 19)



*Figure 6.* Bringle and Hatcher's (2011) ISL definition. These are the three main interlocking ideas that structure academic experience in another country in which students participate in service activities, learn, and reflect for deeper understanding.

Standing at the crossroads of several overlapping subjects, ISL delves into specific fields, such as civic education and community development work, to broader study areas, such as shared inquiry for problem-solving and change and learning experiences, all the while emphasizing critical reflection (Crabtree, 2008). The discipline is continuing to emerge and mature, and with that, is gaining criticism (García & Longo, 2013).

Common criticism against ISL resides among issues related to preparation, international service, and re-entry (García & Longo, 2013). Most of these issues are related to design. At the heart of design is purpose. Purpose relates to intent, which comes about during planning ISL initiatives. In keeping with the spirit of ISL, these initiatives encourage local to global knowledge and

understanding (Brown, 2011). Even so, despite intentions, ISL carries muted tones of division and negative connotations.

**Global service-learning.** Newer literature related to ISL uses the term “global service-learning,” which is becoming more frequent, and over the last 10 years, growing as its own domain (Hartman & Kiely, 2014b). García and Longo (2013), and others, such as Hartman and Kiely (2014b) and Longo and Saltmarsh (2011), make the argument to reframe *international service-learning* (ISL) to *global service-learning* (GSL). One of the reasons is to recognize Cremin’s (1976) concept of “ecology of education” (García & Longo, 2013, p. 115) to refer to the interrelated connections in which learning can take place through civic engagement with local and global communities domestically and internationally (García & Longo, 2013; Hartman & Kiely, 2014b; Longo & Saltmarsh, 2011). The emphasis is not necessarily on the actual physical location and nation-states, but rather the focus is on relational networks and interconnections (García & Longo, 2013; Hartman & Kiely, 2014b) that are reciprocal (Longo & Saltmarsh, 2011). Experiences are community-based driven (Hartman & Kiely, 2014b). It is more holistic to recognize the entire “ecology of education,” the interconnected web of relationships in which learning can occur regardless of being at home or abroad (García & Longo, 2013).

As GSL continues to diverge from ISL, its roots extend into other literature and practice, international education and international development (Hartman & Kiely, 2014b). GSL is a contemporary slant that overcomes the criticism of ISL, lending itself to a strong conceptual foundation because it supports forming and maintaining connections, local community service, and international service (García & Longo, 2013). Transferring strengths from related fields, it is vital for GSL to carefully take on structured reflective practice (Hartman & Kiely, 2014b). What sets GSL apart are five distinct values and priorities, per Hartman and Kiely (2014b):

- to have a commitment to developing student intercultural competence;
- to focus on structural analysis related to contemplation of power, privilege, and hegemonic assumptions;
- to take place within a global marketization of volunteerism;
- to be immersive; and
- to engage critical global civic and moral imagination.

Longo and Saltmarsh (2011) contribute other GSL values and priorities that fit the list above:

- to have global citizenship as a core competency;
- to emphasize domestic and international experiences; and
- to have preparation as a key element.

GSL is new and will continue to develop to emerge with newer information (Hartman & Kiely, 2014b). In the meanwhile, with overlaps, ISL also continues to become established, lending itself more readily to theorizations and frameworks.

**Theories and frameworks of ISL and adult learners.** Giles and Eyler (1994) highlight thoughts supporting the notion not to theorize service-learning due to a stress on practice. It was argued that more knowledge could be cultivated through action rather than discourse (Giles & Eyler, 1994). However, Giles and Eyler (1994) contend the contrary by viewing service-learning as a social phenomenon empirically-based through the application of theory. Theorization renders a systematic approach of creating and shaping knowledge.

Due to the budding nature of ISL's current stage in relation to theory and the emphasis on service-learning in an international context, I opted to relate a traditional theory for this study. One of the reasons is because a function of ISL is to improve knowledge so that it can benefit and develop universal goals (Plater, 2011), which originates from Dewey's social philosophies of the 20th

century according to Crabtree (2008), Giles and Eyler (1994), and Plater (2011). I am currently referencing Dewey's work as a theoretical concept, but others were considered. Over the last few years, many theoretical perspectives and frameworks, as will be laid out and identified in the next section, have been associated with ISL. Perhaps, as ISL becomes more settled in theory and with frameworks, it will continue to serve the evolutionary ideas and become more established to develop GLS and adult learners in higher education.

***Theoretical perspectives.*** Historically, much of ISL's theoretical perspective can be traced back to John Dewey and his founding works related to service-learning theory and his philosophies of democratic (1916) and experiential (1938) education (Crabtree, 2008), reflective activity, citizenship, and community (Giles & Eyler, 1994). Many ISL researchers, such as Crabtree (2008), Giles and Eyler (1994), and Plater (2011), link Dewey to the genesis of service-learning as a theory, which is the base for ISL. Though the term was coined in 1967, service-learning and its research-based conception received more attention in the early 1990s, appearing as a popular topic but calling for more research (Giles & Eyler, 1994). In the early 2000s, within the general field of service-learning, before GSL, ISL was the contemporary academic discussion topic, which launched from other related dialogues and literature (Crabtree, 2008).

To further develop the ISL field, Crabtree (2008) laid out substantial work by mapping various theoretical perspectives linked to ISL. According to Crabtree, a popular theoretical perspective related to ISL is experiential learning and education, which includes work from David Kolb (1984) and Paolo Freire (1994, 1998, & 2001). Kolb's (1984) contemporary applications of experiential learning theory were influenced intellectually by Kurt Lewin, and Jean Piaget. Further, Kolb's experiential learning theory was influenced by Dewey's:

- democratic values of cooperative leadership, dialogue, and scientific humanism;

- pragmatism of experience as an organizing focus for learning; and
- development toward purpose and a lifelong process.

Supporting the connection between Dewey, Kolb's experiential learning and ISL are Freire's (1973, 1974) notions. Freire relates the educational system to social control, saying that it is critical consciousness that opens dialogue that activates exploration of the meaning of personal experience (Kolb, 1984). There is the idea of caring for community while learning in practical ways. Experience and the concept of learning is people focused, which eliminates obstacles that may hinder learning.

Experiential learning theory is "a holistic integrative perspective on learning that combines experience, perception, cognition, and behavior" (Kolb, 1984, p. 21). The theory supports forming quality learning experiences thoughtfully and with intention. There are four structural dimensions underlying Kolb's (1984) process of experiential learning and the basic knowledge that forms:

- concrete experience;
- reflective observation;
- abstract conceptualization; and
- active experimentation.

Learning is a creative process of transactions between the learner and the environment, and not a mere outcome (Kolb, 1984). Whatever the consequence depends on the entire process and its components.

Experiential learning manifests in various forms. Kolb (1984) lists such experiential learning occurrences, and includes apprenticeships, internships, work/study programs, cooperative education, studio arts, laboratory studies, and field projects. Another experiential learning occurrence is the practice of service-learning (Giles & Eyles, 1994). Since ISL stems from service-learning, by default, ISL is also a variant of experiential learning. However, there is caution in

blanketing service-learning or ISL as experiential learning. Similar to the same concerns mentioned by Crabtree (2013) in recent times, Dewey (1938) heeds the danger in labeling all experiences as educative because “Some experiences are mis-educative ... [which] has the effect of arresting or distorting the growth of further experience” (p. 25). Dewey encourages educators to think of issues and educational theory more profoundly, tracing any new movements to historical roots and current societal issues with order and comprehensiveness.

Absent from Crabtree’s (2008) work, but still related to the ISL theories, and in higher education specifically, is adult experiential learning and adult education theory. None of the three fields—ISL, adult experiential learning, and adult education theory—have formal, established theories individually, but the latter two seem to fill gaps for ISL geared towards adult learners. Since there is not a formal theory on ISL, much less for the planning process of ISL, following the lineage of connected theories strengthens the platform for future theorizing.

Adult education is connected to adult experiential learning, which is related to Kolb’s work that is infused with Dewey’s philosophy of experiential education and democracy. According to Malinen (2000), adult experiential learning is the foundation for the conceptualization of adult education theory. The two have a symbiotic relationship. Theory for adult education is fragmented, but Malinen proposes a formal definition of the theory of adult education as “an integrated, comprehensive entity with a high degree of universality concerning the basic phenomena in this area – e.g. the process of adult learning ... [which] emerges from a clarifying study of existing substantive or middle range theories dealing with adult learning” (Malinen pp. 14-15). In order to derive to fuller meaning of a definition for adult education theory, it is inherent that adult experiential learning is understood.

The fundamental category for the skeleton of adult experiential learning theory is personal experiential knowing (Malinen, 2000). This is first-person, first-hand knowledge that is initially created by an individual. It becomes the “hard core” (p. 135). Through the process of introducing “second-order experiences” (p. 135) that may challenge the hard core, which is encircled by “the protective belt” (p. 135), knowledge may be reconstructed if penetrated. Referencing several theoreticians, Malinen (2000) points out important key factors to consider when implementing experiential learning geared towards adults. Even so, she does not relate any parts of her theoretical ideas to planning processes for learners. She does promote the social aspects related to her notions. Experiential learning at the tertiary level is personal and is about doing, or taking action, in order to help an individual reconstruct new knowledge through the transaction between environment and the individual learner. The experiences of an adult learner are based in how the pupil partakes in transformative learning.

Although not addressing ISL adult learners directly, but drawing parallel lines, Poutiatine (2009) explores nine basic principles of transformational learning, along with organizational change theory, in relation to principles for transformational leadership. He suggests that it is essential that leaders who desire to be transformational comprehend plainly the transformation process and be grounded to some capacity in transformational learning theory. In doing so, Poutiatine references several of Mezirow’s works. According to Poutiatine (2009), Mezirow’s general works align a structured theory of transformational process to professional and personal adult learning and development. Mezirow’s (2000) transformational learning theory is a supplementary theoretical framework, also listed by Crabtree (2008), commonly applied to ISL because it offers an understanding of how ISL potentially creates influential learning experiences (Crabtree, 2008; Kiely, 2002, 2005).



Mezirow's general work as a whole on transformational learning theory is also duly noted in the adult learning arena. As the theory for transformational learning evolved over the years, the overall emphasis is for the adult learner to develop autonomous thinking through the process of effecting change in a frame of reference, or preconceptions based on experience (Mezirow, 1997). With the framework that Mezirow offers, as stated by Poutiatine (2009), categories of learning and change can be distinctly sorted. Poutiatine lists the ways of change, per the works of Mezirow. The first two ways of change are: (1) by elaborating existing frames of reference, and (2) by learning new frames of reference, which coincide with Malinen (2000). The latter two ways of change include (3) altering points of view, and (4) shifting habits of mind. Actors of ISL in higher education come with notions and experiences, but then encounter a new experience through ISL. This in turn influences the shaping of new thinking, reference points, and, possibly, modified perceptions, much like penetrating the protective belt, as suggest by Malinen.

However, the key to reaching understanding is through allowing opportunities for critical reflection. Poutiatine (2009) states that Mezirow explains that transformational change incorporates movement through time. This is like Deweyan thinking and a part of thinking reflectively. Additionally, the reconstruction of meaning by different levels of engagement and meta-cognition is also incorporated (Poutiatine, 2009), which is echoed in other theoretical perspectives and a part of the critical reflection process. It includes the practice of reflexivity. Ettlign (2006) refers to "cognitive dissonance as the catalyst for critical reflection," (p. 59), but yet states that there is more. Poutiatine argues that transformation is different from mere change because it is more complex and needs to be experienced at a personal level. Transformation includes the human experiences that involves emotion, physical sensing, spirituality, subliminal and unconscious material, and group interaction (Ettlign, 2006) through a holistic approach (Poutiatine, 2009). There is a scrupulous lens

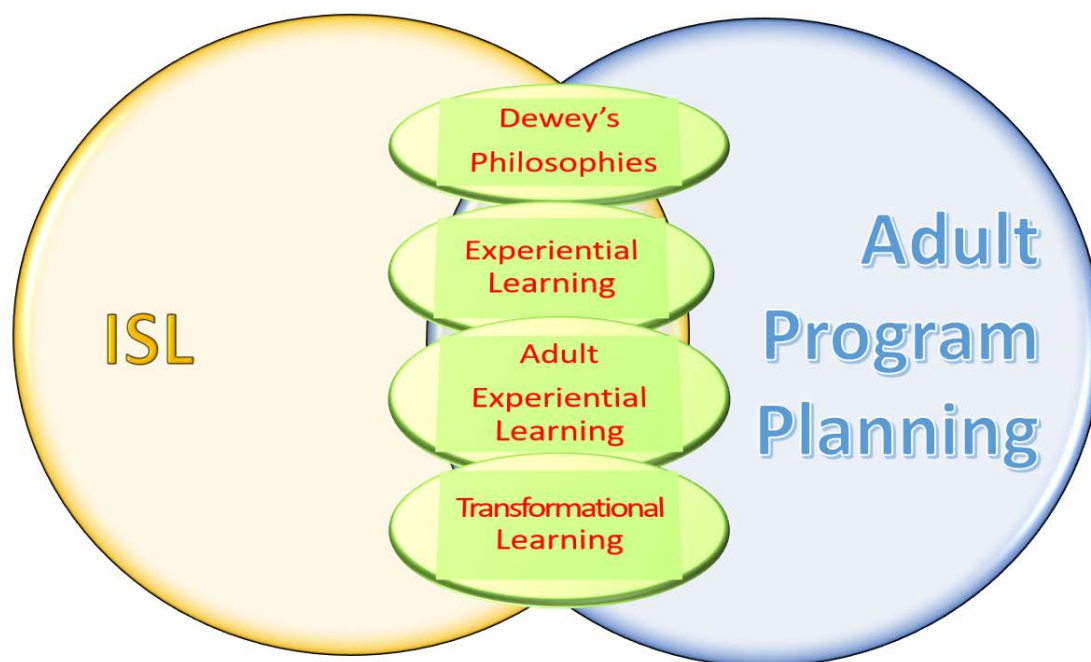
to think through actions and experiences, and then, connect with oneself. It is a process, not an event.

Dewey's philosophy of education, experiential learning, adult experiential learning, and transformational learning theory are traversing methodical approaches related to teaching and educating adult students. Still, there are other supporting theoretical framework perspectives related to ISL, like the frameworks surrounding GSL, especially if ISL is reframed as such. Hartman and Kiely (2014a) suggest a critical global citizenship alternative conceptual model, which combines critical theoretical accounts that have dimensions of global citizenship, service-learning, and study abroad in a postmodern way. What sets this model apart from other ideas is the acute awareness of the fluctuating, uninformed, and abstract societal elements, as well as avoiding past misnomers and harm (Hartman & Kiely, 2014a). The focus is on "intellectual, political, moral, social, cultural, and personal learning outcomes" (Harman & Kiely, 2014a, p. 237). Other benefits of a critical global citizenship, per Hartman and Kiely (2014a), include the following:

- it more visibly explains the multifaceted and patterned ways in which students combine their understanding, intentions, and actions;
- it adds a community aspect as a learning effect;
- it more effectively addresses communication with diverse stakeholders; and
- it creates stronger social networks necessary for supporting long-term and sustainable campus-community partnerships.

Considering that ISL programming for this study is set within the context of higher education and geared towards adult learners, adult program planning theories provide additional lenses to filter ISL. Merriam et al (2007) identify a number of adult learning theories. As seen in

Figure 7, many ISL and adult education and learning theories overlap. Like ISL, the adult learning authors also include Freire's work, transformational learning, and experiential learning.



(Caffarella & Daffron, , 2013; Crabtree, 2008; Malinen, 2000; Merriam, Caffarella, & Baumgartner, 2007)

*Figure 7.* Theoretical perspectives This diagram depicts the major theoretical perspectives related to planning processes for an ISL pilot initiative under development for adult learners in a higher educational setting.

Regardless of the field, ISL, adult learning, or adult education, theories typically mention John Dewey, if even in a historical sense. His theories and ideals branch off in many directions. Many other learning theories are now arguably more prominent, developed, and contemporary. Even so, Dewey's philosophy of education has a strong influence on this present case of ISL and adult program planning. It is for this reason that John Dewey's historical theoretical works related to service-learning theory and his early 20th century philosophies of democratic and experiential education was selected as the lens to filter this project.

**Frameworks.** Frameworks are models to express theories and concepts concretely. Some research exists on ISL primary models (Berry & Chisholm, 1999) and design variables (Bringle, Hatcher, and Jones, 2011), but are listed more like suggested recommendations and not elaborate studies. McBride and Mlyn's (2012) work is significant because it specifically lists five suggestions to execute international service endeavors that are evidence based. These are simple processes of what to do to operate international service endeavors. The suggestions are integral guidelines in the process of developing ISL programs.

The first suggestion provided by McBride and Mlyn (2012) is to start with the end in mind as “win-win” (Begin with the End in Mind, para. 1) goals for all concerned parties, including the host site, served community, students, and institutions. Negotiation and understanding of social, economic, and political dynamics are also required in this primary step. A second major component focuses on the act to work through the progressions (Emphasize and "Process" the Process, para. 1). This means contemplating the procedures involved, the implications in building rapport across all stakeholders, and developing long-term partnerships. A third practice is the ability to deepen the experience with longevity and immersion within the cultures by having exchanges for a period of time between partners and by being able to speak the language of the host volunteer site. The fourth proposal is to follow up on the phenomenon to help capture a fuller capital on the “post-experience” (Include Follow-On Learning, para. 1). Although there are no specific propositions on how to institutionalize this phase, it is recommended that participants get the opportunity to interpret their experience, deliberate on their learning, reflect introspectively, and think about how to apply their newfound knowledge and incorporate it into their local context, schooling, and careers. Finally, the last part emphasizes ownership. Those involved should take responsibility for the development of the experience.

With the five suggestions listed, McBride and Mlyn (2012) argue that the discussion to tie practice to research is promoted and advances pedagogical approaches to shape programs and their outcomes. The authors advocate procedures based in research in order to have a clearer understanding of the consequences for the students and community that come from the activities involved. The experiences stemming from international service endeavors must yield benefits concurrently to student development and the groups involved. Although providing some direction to ISL program development, the descriptions of the suggestions are brief, leaving room to be expounded upon.

There are other frameworks that serve as ISL models, such as Pechak and Thompson's (2009) Optimal ISL model. Even so, there has been little to no research solely on the developmental aspect of ISL programming that zeros in on planning processes. Bringing my research to light will show the various dynamics at work during the beginning stage of ISL. To the extent of this study, there are no literary cases that specifically focus on this initial stage, nor one that looks at ISL development from a holistic, collaborative perspective that includes a range of voices and is specifically geared towards adult learners in higher education.

### **Planning and Designing for ISL and Adult Learners in Higher Education**

Aside from the philosophical, theoretical, and conceptual frameworks, knowing a process for developing an ISL program is a pragmatic issue. It is much more than the mere construction of programming, but an awareness of how it is designed (Wilson & Cervero, 1996). Thinking through the planning and designing aspects during the development of an ISL pilot initiative under development sheds light on the plethora of positions and multiple constituents that could potentially be affected. Bringle and Hatcher (2011) state, "... the design and implementation of ISL raises many important ethical issues" (p.20), such as the ethics associated with actually doing ISL, the

rationalization for a U.S. higher educational institution to go to another nation's community, and knowing how to manage the differences of U.S. students. As such, Longo and Saltmarsh (2011) advocate to reframe ISL design to a GSL-friendly model when planning. Additionally, if an ISL program is being designed for the tertiary level of education, the planning for adult learner students also needs to be considered.

Jacoby and Brown (2009) offer student-centered guiding principles for international civic engagement experiences. Since ISL is a form of civic engagement, these principles are applicable. As such, one of the principles states that academic and field experiences must fully merge, having clear, fundamental student learning outcomes at suitable developmental and academic levels through quality design and dependable implementation (Jacoby & Brown, 2009). This basically means that the intended activities should complement the degree of what students know and ought to be learning. New knowledge is to build from background knowledge. Ultimately, students' experiences are to have the deliberate purpose of being rigorous and enriching to the learning process with support systems in place to foster that growth (Jacoby & Brown, 2009), particularly within the context of global citizenship and participation (Brown, 2005). By the same token, students are to have exposure to different viewpoints, theories, and ideas (Jacoby & Brown, 2009). Further, depending on outcomes sought after and achievement measurements set, academic content and pedagogies should match to inform students' practical experiences and be evaluated regularly (Jacoby & Brown, 2009). International civic engagement experiences guiding principles in higher education are targeted and formatted for all students to develop. Pending on needs, objectives, and contexts, student-centered programs for adult learners will vary greatly (Caffarella & Daffron, 2013).

Preemptive awareness lessens unintentional adversity that may distress partners. McBride and Mlyn (2012) advise international service research to represent more than good intentions. ISL

participants, even students, are to accept the challenging responsibility to better understand their roles and do no harm (Hartman & Kiely 2014). Just as important to pre-departure preparation is support for re-entry to domestic culture (Jacoby & Brown, 2009). Ideally, gathering other participants' ideas, views, input, and feedback will make understanding of the entire initiative more holistic (Bringle & Hatcher, 2011). ISL has many components and blends several mechanisms and ideals. There is some bounded complexity. It is more than study abroad with integrated volunteer work (Bringle & Hatcher, 2011). Compromise strengthens the cooperation involved. As a guiding principle of civic engagement, ISL is to provide services that are justly beneficial to the community or organization involved (Jacoby & Brow, 2009) and to the students. A comprehensive ISL strategy and undertaking should set commonalities that spread throughout its programming, internationalization pieces, and service-learning parts so that the same language is spoken and the standard understood by all partners. Doing this will support the development of a structured ISL program that can further consider sustainable and effective experiences that can lock in on the needed fulfillment for all those involved.

There are exclusive guiding principles for international civic engagement experiences that are centered on the community to safeguard community needs and expectations (Jacoby & Brown, 2009). One of them is to communicate with all parties involved to ensure the community's voice is heard and to follow up on the idea of reciprocity between the community and other partners (Jacoby & Brown, 2009). Those involved in the planning of an ISL experience under development should be aware of the group at play and acknowledge the gain of the holistic perspective that comes from multiple points of view, desired goals, and intentions. It is dependent upon the planners whose interests are negotiated and recognized because of the form and content that they include in the designs (Wilson & Cervero, 1996). Planners coordinate the various perspectives that need to come

to the table. In ISL, this includes perspectives from those in service and those being served. ISL literature cites that a voice other than academia's needs to be heard: the community's (Bringle et al., 2011; Crabtree, 2013; McBride & Mlyn, 2012). When the community's voice is present, the ISL experience is balanced. Community partnership in ISL initiatives is most effective in identifying and solving their own community-oriented problems (Nelson, 2015).

Effective ISL planning and design for adult learners integrates the practice of reflection. Throughout service-learning literature, the practice of reflection comes up frequently, citing the imperativeness of it (Brown, 2011; Crabtree, 2008; Giles & Eyles, 1994; Jacoby & Brown, 2009; Jones & Steinberg, 2011; Penchak & Thompson, 2009; Plater, 2011; Tonkin, 2011; Whitney & Clayton, 2011). Reflection is also present in the literature regarding adult learning and education (Knowles, 1980; Malinen, 2000; Merriam et al, 2007; Tough, 1971) and planning programs for adults (Caffarella & Daffron, 2013; Tough, 1971; Wilson & Cervero, 1996). ISL programming needs to build in personal and objective reflection (Jacoby & Brown, 2009). Reflection triggers learning, outcomes, impact, issues, strengths, and the relationships of an ISL plan and design.

There are many similar issues and general overlaps between ISL and adult education, which should be taken into consideration when first developing and designing ISL for adult learners. For one, adult education is blended with other areas of education and learning, such as in policy. Furthermore, adult education research and theory has been under development since the 1990s, and is still fragmented (Malinen, 2000; Milana & Nesbit, 2015). Likewise, there have been steps taken to advance the issues involved in adult education, but with slow traction. There are no specific program designs or planning processes for ISL or for adult education, but designs for each respective field benefit from having trusted, flexible standards to work from and modify to fit individual contexts.



**Specifics for ISL designs.** There are several ways in which ISL can be implemented. This is one of the major considerations with preliminary planning for initiatives under development. Jacoby and Brown (2009) list three to consider: using third-party providers; enrolling in programs from other colleges and universities; and designing and operating its own program or course. If an institution is designing its own ISL, it will require support of administrators and students to organize (Elon University, 2005). Brown (2011) and Jones and Steinberg (2011) detail ISL planning decisions, including whether the design will be:

- formatted to single courses and subjects or to several disciplines;
- an independent study;
- offered to individual students or a group;
- serving one entity or several;
- implementing reflection and evaluation and how;
- including foreign or domestic faculty;
- structured, intensity-wise, as a high or low contact service experience; and
- structured as a program or through courses; i.e. all-in-host-country, Sandwich Structure (curriculum study followed by service and completed with additional study time, reflection, and examination), or practicum or competency-based service.

The program's intentions influence what the design looks like. Yet, despite the format, certain elements carry through. Nelson (2015) identified six foundational ISL program elements linked to learning outcomes and participant impact. The first one is guided critical processing. This includes challenging students to process thinking in order to acquire new information based on the ISL experience through reflection. Reflection activities include listening and talking to others, personal journaling, and participant research. International border crossing is a second element for

ISL programming. This element is ingrained within ISL and pertains to the immersion in a foreign culture, language barriers, and experiencing ways of a developing country. It enhances diversity learning and critical consciousness to debunk stereotypes, to appreciate and accept foreign cultures, to influence the recognition of universality, to facilitate the desire to do more and figure how to do so, and to assist in dealing with personal struggle with inadequacy or helplessness. Another element is reciprocal connections and personalizing. This is based in building rapport between those who served and those who received the service. There were dual benefits and relationships built. The fourth element of ISL is group dynamics. This is geared more towards the ISL participants and their interactions with one another as a learning community. Non-service activities are a fifth element, including listening to and participating in discussions with the ISL organizers and community partners, casual interactions with those being served, participant presentations, and traveling to and touring various historical, cultural, and recreational locations. These experiences expand and challenge students' prior knowledge and understanding of matters related to ISL programming. Lastly, the final element is related service projects. This is having the ability to generalize one service-learning project to another. Overall, these elements provide the theoretical basis for a new ISL Group Model for practitioners, which could be incorporated into an ISL design that is directed towards adult learners in higher education.

**Designing for adult education and learners.** Interest in adult education rose in the 1920s (Merriam et al, 2007). Throughout the 1900s, and into current times, interest in adult education and learning is very much on the forefront. During the early 21st century's era of change, quickness, and access to information, adult learners are challenged to continue their education. According to Merriam et al(2007), adult learners need to keep up knowledge in technology, job-training, literacy, civic education, liberal and leisure learning, and community-based social-action initiatives. With this

in mind, education is to oversee its traditional role of teaching the young, but to also adhere to those who continue to learn. The changing demographics of students is not only a U.S. concern, but a global one.

Milana and Nesbit (2015) call attention to global perspectives on adult education and learning policy and how they affect developments in higher education, citizenship, and democracy. Adult education is described by Milana and Nesbit as the all-encompassing and intentional practices, processes, approaches, activities, and strategies, including those in higher education, for pedagogical subjects independent of age, responsibilities, educational attainment or socioeconomic conditions, background, and the venues in which such learning takes place. This kind of education serves to extend and develop adult students' knowledge, skills, judgements, and sense-making actions and capacities (Milana & Nesbit, 2015). Issues, such as policy, the government's role, and higher education's ability to craft programs affect ISL program design at the tertiary level. U.S. adult and continuing education are interwoven with general education, welfare, and employment matters that are wrapped up with federal-state regulations and the expansion of non-traditional policy actors (Milana & Nesbit, 2015). Often specific personnel are assigned to deal with the complexities that encompass adult education, learners, curriculum, and programming. The person whose main role is being a program planner usually works with supportive personnel to develop, implement, and evaluate programs (Caffarella and Daffron, 2013).

When designing for adult education and learners via ISL, one of the initial considerations is the desired results of the program. As a deliberative action, planning is a process, but is also about outcomes (Wilson & Cervero, 1996). Ultimately, the purpose of including ISL initiatives is to provoke academic and social shifts. Curriculum and activities enhance thinking, knowledge, skills, and understanding, which are intended to create change in students. Caffarella and Daffron (2013)

list three types of changes as primary outcomes when conducting programming for adult learners. The first is in the individual self, meaning an attainment of new knowledge, building skills, and examination of personal values and beliefs within each student. The second change is organizational change. This is change that leads to new or revised policies, procedures, and ways of working and is regularly prepared by organizational leadership who prepare trainings for subordinates. The third listed change is communal and societal. Change in this manner provides approaches for divergent civic groups to coordinate to respond to public concerns or issues in alternative ways, which can affect positive change on a larger scale. This may include regional groups, statewide networks, or international nongovernmental organizations.

According to Cafferella and Daffron (2013), three typical approaches to planning programs for adult learners enact change. The conventional or traditional approach progresses logically, step-by-step (Caffarella & Daffron, 2013; Wilson & Cervero, 1996). Another approach is the pragmatic or practical approach. It is situational and takes into consideration the live context and culture of the scenarios that present themselves during the practice of planning. This is because it is impossible and irrational to mimic the same procedures of planning from situation to situation (Wilson & Cervero, 1996). The pragmatic or practical approach recognizes the complexities and shifts taking place during the planning process. Some included strategies with this approach include flexibility, negotiation, listening, and dialogue (Caffarella & Daffron, 2013). The last approach is radical planning. Radical planning focuses on social activism, democratic principles, and transformation (Caffarella & Daffron, 2013). This framework pushes more societal change and is structured to think through ideas and concepts. Although these approaches offer structures for designing ISL programs for adult learners, more concrete aspects are needed.

Adult experiential learning adds to planning approaches on a more operational level. It takes into account the importance of prior knowledge acquired (Caffarella & Daffron, 2013). With this, adults offer unique contributions to share within the learning process. Learning for adults is social and should include reflection, dialogue, and an opportunity to have adult learners be independent, but not at the expense of casting out socialization (Malinen, 2000). While designing ISL programming for adult learners, space needs to be carved out for student experiences to be acknowledged. Program planners can gather this information through needs assessments, target audience analysis, and storytelling (Caffarella & Daffron, 2013).

The setting where learning takes place for adults is also important. The learning space for adults spans from formal classrooms to informal settings, such as one's home (Merriam et al, 2007). Much of it depends on the adult learner's purpose of wanting or needing to continue their education and what kind of program the learner is participating in. Where and when is very much dependent on time and money for adult learners (Merriam et al, 2007). The physicality of learning venues and schedules of instruction are only a few of many considerations when organizing learning programs. Likewise, Malinen (2000) stresses the importance of facilitating sensitive, supportive emotional milieus, with the physical setting being secondary to the mental environment.

According to Malinen (2000), the environment must be safe, supportive, and open, where empathy and communication are prevalent, yet can provide challenges in a structured fashion. Adult learners demand rigor. Programming at the tertiary level is to be intense and process oriented to connect the abstract to the concrete and real world (Malinen, 2000). Tasks should be set in a manner to where they can be completed, and at completion, provide greater understanding (Malinen, 2000). Programs for adult learners must allow the adult learner to take personal ownership, yet be social (Malinen, 2000; Merriam et al, 2007) because learning does not occur in isolation. The social

platform allows adult learners to interact with peers and colleagues rather than with authority figures and competitors.

The learning atmosphere affects adult student participation. Conditions that balance teacher and student as joint inquirers that respect one another invite safety in terms of acceptance and openness to new roles and ideas (Malinen, 2000). This space attracts busy adult learners with numerous obligations (Merriam et al, 2007). Adult students may choose not to participate if the learning venue is not appropriate or ill-suited. Students in this category participate in learning programs that give them the ability to be expressive (Malinen, 2000). When adults feel involved, they want to be a part of the learning community. This is part of the sociological factors (Merriam et al, 2007). The community of adult learners is one where students build personal relationships. This helps older students to expose themselves. Programming set up for low risk of making mistakes preemptively avoids humiliation and personal attacks (Malinen, 2000). There is a need to think about the individual learner and how that one person is able to get along with others. The nature of the adult learning world encourages cooperation, positive rapport, and building community based on commonalities (Malinen, 2000). There is opportunity to know individuals as people. Rather than a program being systematic, it is designed for personalization, care, and trust (Malinen, 2000).

### **Summary**

The works shared in this literature review address the history and conceptualizations of ISL, including definitions and theories, and works within planning and designing for ISL and adult education and learners. Thus, the cited sources demonstrate that higher education is a venue for adult learners and change of individuals, organizations, and society. Higher education institutions also advocate for internationalization as a core outcome within their educational programming (Sperandio et al., 2010). Higher education will also influence commitment to civic engagement

(Dugan & Komives, 2010), social justice (Eidson, et al., 2014), and socially responsible leadership (Bamber & Hankin, 2011). Civic engagement and globalization issues are interlinked (Sperandio et al., 2010); thus, institutions are increasingly concerning themselves with the idea of global citizenship and engagement (Bamber & Hankin, 2011; Nickols, Rothenberg, Moshi, & Tetloff, 2013). A variety of skills and competencies, such as knowledge of approaching controversy with civility, are developed positively and effectively through community service involvement (Dugan & Komives, 2010) and lead students to naturally navigate work within the communities in which they are involved. Through service, individuals with different backgrounds who normally may interact or not interact with certain people will pull together for the collective good, and as a result, the service leads to a better understanding of one another and becoming more self-aware (Elon University, 2005).

Studying the process of planning the development of an ISL pilot initiative will allow the opportunity to explore and understand how ISL pre-design provides the education and development for adult learners to foster their international civic skills while addressing needed resources for individuals and communities (Brown, 2011). Such an examination will continue to grow the ISL discipline and make connections to the upcoming works of GSL. This research links theory with practice. The next chapter details the methodology for the study.

## Research Methodology

Sociology is the study of humans and society. It mainly looks at the phenomenon of groups. Qualitative research in education is influenced by sociology (Boyask, 2012). Four critical elements in qualitative research methodology that link to sociology, as described by Boyask (2012), are:

- attempting to understand a group from the group's own point of view;
- developing insider perspectives by living and participating within the group;
- understanding the subjectivity that impacts analysis; and
- studying groups within complex settings constructed by multiple and interrelating groups.

Using qualitative methods in studying higher education pedagogy and programming for ISL sheds empirical light on many social and interactive aspects.

Kiely (2005) recommends that future service-learning research be empirically based. This recommendation derives from the outcomes of one of his studies that analyzed a transformative learning model for service-learning. ISL field experts, such as Kiely and Hartman (2011) advocate the importance of using qualitative research, and case studies specifically, for program improvement. My study heeds such suggestions and elements by exploring the process of the initial development of an ISL initiative as a qualitative, intrinsic case study (Stake, 2005).

A case study is a qualitative research methodology in which investigators emphasize the detailed exploration and description of single entities, individuals, small groups, or phenomena, becoming the case under investigation (Becker et al., 2012; Kiely & Hartman, 2011). More specifically, as an intrinsic case study, the subjects' experiences involved in the initial development of an ISL initiative are analyzed. Data collection draws from the bounded nature of the case, its historical background, the physical settings involved, related contexts, other cases, and from



participant informants (Stake, 2005). As a qualitative study, the research design discloses experiential occurrences and seeks informational patterns (Stake, 2005).

My study concentrates on exploring an occurrence at a Catholic liberal arts university in south-central Texas in order to interpret and re-present participant experiences, viewpoints, and beliefs through interviews, along with the use of archived organizational documents and records and my personal insider perspective (Allwright, 2005; Bishop, 2005; Insider/Outsider Perspective, 2007; Jain, 2013). I wanted to investigate “the stories of those ‘living the case’” (Stake, 2005, p. 445). These stories also include me as a practitioner researcher. I shared my “conceptual structures” (p. 455), as well as my personal meanings of events and relationships (Stake, 2005) from the first- and third-person perspective. My goal was to analyze this single case since I had particular interest (Stake, 2005) due to partial responsibility in developing this venture. My motive is similar to Allwright’s (2005) motive to connect practice with scholarship. I wanted to know what could be learned about this one case and its situation, complexities, particularity, and ordinariness (Stake, 2005).

Ethical considerations addressed included having appropriate inquiry and meaning through reflection, as recommended by Whitney & Clayton (2011). Crabtree (2013) states that positive and negative outcomes stem from ISL. Discussions regarding ethical dilemmas are needed when considering ISL projects (Crabtree, 2013). Harm should be avoided by managing experiences well, including trips and courses (McBride & Mlyn, 2012). Further inspection of ISL construction can include the various nuances and multiple positions of those involved.

### **Research Design**

This study explored the process of an initial ISL initiative under development as a qualitative, intrinsic case study (Stake, 2005). According to Stake (2005), “Intrinsic casework regularly begins with cases already identified” (p. 450). The case I explored was already decided by

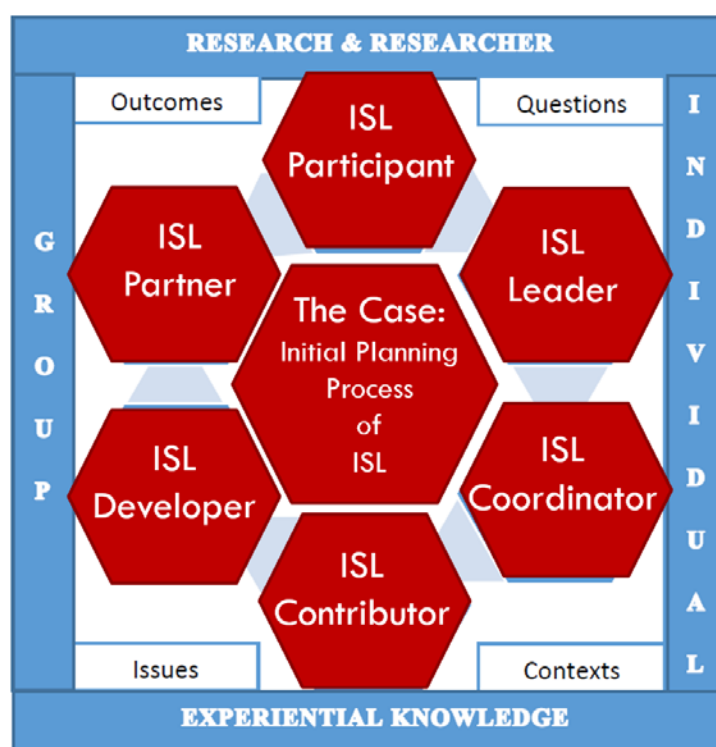
the work I did with an ISL planning committee that is connected to a Catholic university's center for civic leadership in south central Texas. The Peru ISL initiative in this research was under development and in the beginning stage in 2015. It continues to be in consideration for further expansion, along with other similar initiatives. Various actors, including myself, the center, university members, a local women's non-profit organization, and community partners in Peru, comprised the team. The team's knowledge, created from participating in the planning stages, furthers the understanding and creation of the scope and components of the initial development of an ISL experience. My study is threaded with broader generalizations of ISL program development (Stake, 2005), enabling my intrinsic case to serve as an exemplar or a comparable to build upon for future research (Stake, 2005).

The different components and the relationship of those components of my research design and methodological approach are demonstrated below, in Figure 8. It is framed by four sides that bound the case study: (1) the actual research and researcher; (2) the knowledge gained from the experience of developing the initial ISL program; (3) the individuals involved; and (4) the individuals together as a single group. In the middle lie the participants. The participants are the ones who fill in the case with insightful data and information. Like cells, they are individual pods, serving as "mini-cases" (Stake, 2005, p. 451). Since they are embedded within the case itself, together they create a fuller picture. The questions, contexts, issues, and outcomes allow the participants to provide details.

### **Methodological Approach**

According to Salisbury (2012), researchers implementing qualitative research in education and who are undertaking research projects that investigate vocational training programs, similar to ISL, identify the research question to frame the study and review extensive literature that sheds light on the social processes and curriculum. Further, new and complex patterns of interconnectedness

are needed and can be found by generating data to build up thick descriptions, or rich depictions, among a variety of methods, including observations, in-depth interviews, participant diaries, and focus groups. Taking Salisbury's points into consideration, one of the methods for data collection in this study included a semi-structured question method for interviewing (Brinkmann & Kvale, 2015).



*Figure 8.* Model of the study for the initial planning process of an ISL pilot initiative under development. This is a sketch plan for the intrinsic case study underway. It identifies and organizes the boundaries to be observed. As described by Stake (2005), the figure displays the case as “a functioning body” (p. 444) made up of individual selves working together as a “bounded system” (p. 444).

According to Forsey (2012), interviews are popular in qualitative research because they provide an efficient method to gather unique, rich data and provide dialogical information that can be constructed in a concrete fashion that is feasible to work with. Interviewing is one way of capturing a conversation. Interviews are social events (Forsey, 2012). Typical conversations are fluid and are dependent upon what is asked, the follow-up responses, and the other spontaneous dialogue

that arises within the interaction of those involved. The implementation of Brinkmann and Kvale's (2015) questioning technique allows for an alignment of questioning to the research questions and flexibility in changes that may occur from the interaction with the interviewee. Thus, according to Forsey (2012), listening was key because it helps construct follow-up questions and pick up on conversational cues. In-depth interviews with appropriate open-ended questions provide understanding of particular events, behaviors, and phenomena that mean something to individuals or groups of people (Forsey, 2012).

The interviews were only one method of collecting data. According to Forsey (2012), interviews are best used with "a suite of techniques" (p. 365) to address a research question. Other methodological approaches used in this study were the utilization of additional sources, including archived documents that contained group meeting notes, organizational documents and records, and emails, as well as the use of reflexivity through a personal planning and travel journal. Triangulation for this research project was accomplished with the supplemental items being part of the "process of using multiple perceptions to clarify meaning, verifying the repeatability of an observation or interpretation" (Stake, 2005, p. 545). Having several sources of information from which to draw findings provided the opportunity to create a more holistic picture as a representation of the findings. Triangulation is vital to qualitative research in education and for vocational education and training (Salisbury, 2012). For this research inquiry, the patterns from the three pools of information led to a better understanding of the initial planning process of an ISL pilot initiative under development geared toward adult learners set within the context of a U.S. higher education institution.

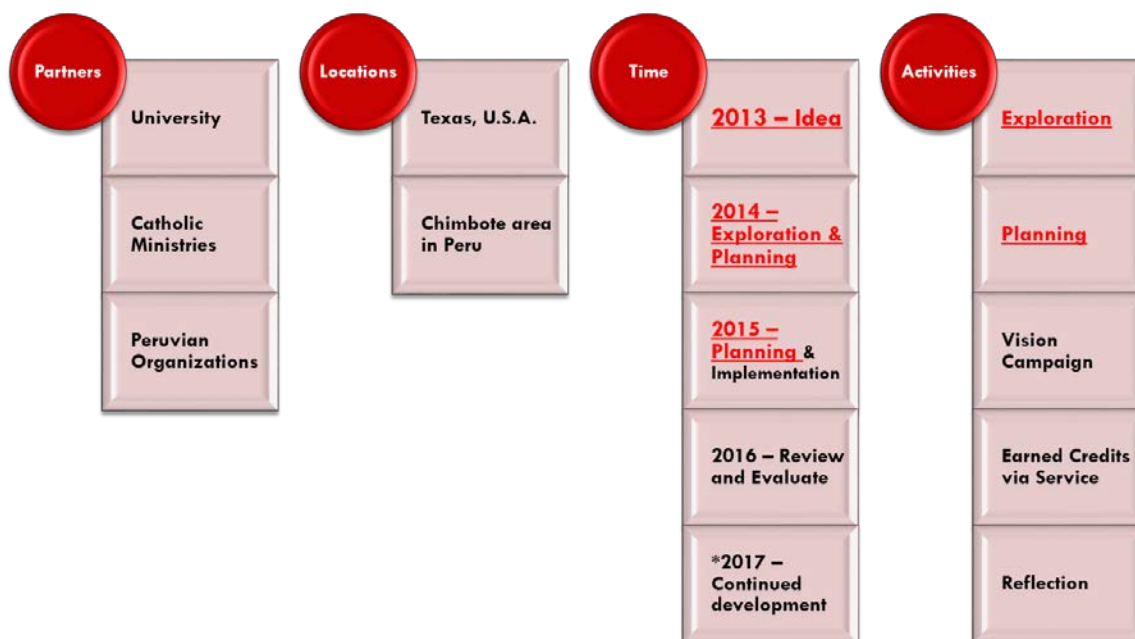
## **The Programmed Initiative**

A group of inter-professional students, faculty, and staff from a private, Catholic university in south-central Texas in the United States went to the Chimbote area in Peru in December 2015 to participate in a first-time ISL experience. Other project stakeholders involved the university's center for civic leadership, a non-profit organization focused on leadership and empowerment for women, a Peruvian school of optometry, and an order of nuns whose ministries extend across the globe. Together, all parties involved made contributions toward specified volunteer projects situated in the Chimbote area. These activities connected to individual and mutual goals while providing a platform for opportunities for learning, capacity building, and sustainable partnerships for future endeavors.

The actual inception of the idea for the 2015 ISL experience began with a vision in 2013. A sister from the congregation, who was in tune with the congregation's ministries worldwide, brought together university personnel to brainstorm ways to serve globally. A small committee was formed and met regularly throughout 2013 to 2014. Agreeing to make initial ideas concrete, it was decided that an exploratory trip was needed, which took place in December 2014. Over the course of the year, 2015, between exploration and implementation, the university civic center collaborated with other initiative actors and administrators to plan the first official ISL experience as a pilot initiative. Post-trip processes also occurred. During the semester after the 2015 trip, in Spring 2016, summaries, evaluations, and peer-review journal article drafts were written, post-trip meetings were held, reflections were collected, and presentations were given.

The university civic leadership center continues to develop its international component into its overall programming and vision of the university's future ISL. The intent of the Peru initiative was to expand the work into a system that implements ISL regularly at the university. In March 2016, the university center hired a part-time global immersions employee to specifically oversee the

development of campus-related ISL. Figure 9 depicts the program, highlighting in red the main components under investigation for this study. The emphasis is on the initial planning process and the information that comes from the 2013 to 2015 pre-ISL pilot experience that took place.



*Figure 9.* The ISL programmed pilot initiative under investigation. This figure organizes the different aspects, including timeline, of the studied ISL initiative.

### **The Service Area: Peru**

Global organizations (De La Torre, Didier, Ize, Lederman, & Schmukler, 2015; IMF, 2017; WHO, 2015; World Bank Group, 2015) suggest that Peru is overcoming poverty and its people are living longer, healthier lives when compared to the beginning of the 21st century. Peru, as a country, is on the rise. Despite positive changes indicated by Peru's statistics over the last decade, the country continues to encounter socio-economic and governmental challenges. One of the biggest obstacles facing Peruvians is the lack of health supplies and general resources, as well as the wait-time and access to services (Alcalde-Rebanal, Lazo-González, & Nigenda, 2011). There is a great difference

between those who can afford private health coverage in urban areas versus those receiving public assistance in poorer, rural regions (Alcalde-Rebanal, et al., 2011). As I reported for the university center's 2015 in-house program report, travelers and participants noted stark differences in living conditions and neighborhoods in Lima, Chimbote, and Cambio Puente between 2014 to 2015.

The religious sisters involved in this intrinsic case study are well established in Peru and have been ministering primarily in the areas of education and health in Peru for over 50 years. Over the course of these five decades, their work and area of service has changed. Currently, the sisters serve primarily in the metropolis of Lima, and in a much smaller town, Chimbote. Their ministries from within the U.S. cross over international borders and overlap in serving the community-at-large. One of their biggest ministries is a university learning community in south central Texas that interacts regularly with the sisters' other ministries locally and globally.

**Chimbote.** Chimbote is the largest Peruvian fishing town (ChimbotePeru.com, 2013) located along the coast, about 8 hours north driving distance from Lima, as seen in Figure 10. It is located in the Ancash region in Peru, with a population of about 400,000 (Friends of Chimbote, 2017) to 450,000 (ChimbotePeru.com, 2013) people. Major economies include ship construction and repairs, mining, and agriculture (ChimbotePeru.com, 2013). Chimbote has most of the modern conveniences that a typical western urban life offers, such as electricity, running water, and sewage. Even so, it is situated in a third-world country and possesses many of the characteristics associated with that. Pollution, job insecurity, and the need for more developed city infrastructure are issues that this city confronts. It also shares the inherent problems of the rest of the country, such as poverty and lack of access to healthcare.

The religious sisters involved in this case study opened the first and only hospice in Peru in Chimbote. The hospice is under the umbrella of a health system that also includes a clinic offering a

variety of primary health services, such as vision care, and more specialized care. Other housed services range from routine health services, such as pediatrics and women's health, to areas such as physical therapy, mental health counseling, and internal medicine. The clinic itself is a ministry of a Catholic order of sisters which began over 50 years ago. Through the health clinic, the health system also offers community healthcare throughout the area of Chimbote and its surrounding suburbs, including Cambio Puente.



*Figure 10.* Map of Peru. The city of Chimbote is circled to give better familiarity of the location of the service area for this research.

**Cambio Puente.** Cambio Puente is a suburb of Chimbote. From central Chimbote, it takes about 20 to 30 minutes driving northeast to arrive by taxi. The last quarter of the ride is on a dirt road. It is considered a shantytown. Most homes are made of thatch. Little to no infrastructure is available. There is no running water. Most of its electricity comes from individual power generators that supply multiple homes. There is a small municipality office, but no public services, such as firehouses or hospitals.



The sisters in this case study have been working many years with this community. One of their primary works is through a community health program that tracks children and their growth, seeing if they are meeting certain physical developmental milestones, such as height. The program primarily seeks to educate those involved and provides referrals to additional health services, as needed, and some resources, such as vitamins.

### **Access**

Maxwell (2013) states that relationships are imperative to a study's methods because how these relationships begin and are maintained affect research design. Since I am part of the "social world" (p. 90) of my study, there is a reciprocal impact and a complex formed relationship (Maxwell, 2013). The key to access is through the fostering of positive relationships among the university center for civic leadership leading the ISL initiative, the ministry of the sisters in Peru, the university, and others involved in the case. I directly facilitated the center's relationships through my role as a community partnerships coordinator for an office that is in partnership with the 2015 ISL stakeholders identified. Since I either had a working relationship with the participants or a shared travel experience in Peru with them, gaining access to all the participants involved in the case was not difficult. The participants recognized me as one of the coordinators of the 2015 Peru initiative. I retrieved participants' contact information from the civic leadership center's records and directly contacted each one. Through a personal approach, I recruited and obtained participants' consent to interview them. All interaction with participants was by email, telephone, virtual-conferencing, or face-to-face.

### **Participants**

My goal was to include participants who are not only familiar with the subject matter and who complied with the participant selection criteria, but who could add value to the study, as well.

The relationships bounded within this case of stakeholders involved with this particular ISL initiative provided an advantage to gain candid and insightful information. Participation was voluntary, and no reward or compensation was given for participating in the study. Six to 12 subjects were needed for the study. The number of participants was based on the research design graphic (Figure 8).

There were six types of individuals fulfilling certain viewpoints that play a certain role within this ISL intrinsic case study:

- ISL Participant;
- ISL Leader;
- ISL Coordinator;
- ISL Contributor;
- ISL Developer; and
- ISL Partner.

Initially, I thought that I would attempt to interview one to two subjects per role. I was able to interview at least one interviewee from each category.

When conducting purposeful selection, participants should complement a study's questions and goals (Maxwell, 2013). For this study, I used Maxwell's (2013) purposeful selection model to identify individuals who were relevant to the research question. Since this was an intrinsic case study, I selected members of the team who oversaw or influenced the development of the 2015 Peru ISL experience. Each person interviewed played an important role in filling the case's individual categories, creating a more holistic picture. Below is a table listing the interviewed participants, their role in the 2015 Peru initiative, and their role within this study according to the research design graphic (Figure 8), which may be more than one category. So as not to give any significance to any one interviewee or role, participants are listed in sequential order of interview meetings.

Table 1

*Participants and Their Roles*

Participant	Role in the 2015 Initiative	Role within the Study
Interviewee 1	Non-profit organization leader	ISL Partner
Interviewee 2	University assistant professor and vision campaign leader	ISL Participant, ISL Leader, ISL Coordinator, ISL Developer
Interviewee 3	Leader and decision-maker in the university office of civic leadership involved with global planning and service-learning	ISL Leader, ISL Contributor, ISL Developer
Interviewee 4	Non-profit organization contributing coordinator and decision-maker	ISL Partner
Interviewee 5	A lead administrator of the university for civic engagement	ISL Participant, ISL Leader, ISL Developer
Interviewee 6	A university faculty participant	ISL Participant, ISL Leader, ISL Coordinator, ISL Developer
Interviewee 7	Peruvian community member who is an optometry school lead administrator	ISL Contributor, ISL Partner
Interviewee 8	University student participant	ISL Participant
Interviewee 9	Peruvian lead clinic administrator	ISL Partner

The participants' perspectives and experiences explored illustrate the process of planning that took place while developing an ISL pilot initiative, and more specifically, provide understanding of the collaboration between a south-central Texas private, liberal arts university and a ministry of Catholic Sisters in Chimbote, Peru. As such, I viewed the participants as "gatekeepers" (Maxwell, 2013, p. 90). Even though I already had access to this case and those involved, I negotiated and renegotiated my role as a researcher to gain appropriate information (Maxwell, 2013), including anything negative that may need to be brought to light. These gatekeepers provided access and buy-in to other potential participants. Gatekeepers are instrumental in providing insight into the process of planning the development of an ISL experience. If I had needed more participants, the

gatekeepers could have made recommendations. A snowball sampling technique was considered in order to seek other potential study participants. However, gatekeeper recommendations for additional participants were unnecessary because of the nature of the case and the fact that I was able to obtain nine appropriate interviewees.

Basic participant demographics were documented, but were an unimportant issue for my study. These facts are not an area of focus, and thus irrelevant to this study. They simply helped to identify participants during the analysis and to organize findings. The emphasis was on those who were able to provide insight and information on the process of developing the ISL pilot initiative. Participant roles were of most value.

Individual participant information included participant identities, voice- or audio- recordings, transcriptions, and the signed consent forms obtained. As recommended by Forsey (2012), informing participants of the research project and getting their consent to be a part of the study were imperative because of the sensitive nature of having participants sharing their truths and protecting their vulnerabilities. Appropriate procedures, such as IRB and signing consent forms, took place before interactions with research participants. Participant confidentiality was maintained by storing and keeping records safe on a password protected computer/laptop, and those that were on printed hardcopies were stored in a locked file located at the researcher's home office when not in use. Printed records were directly under the researcher's supervision when used for analysis. Some of the original documents collected, analyzed, and archived may have contained identifiable information. These documents were reviewed by me, the researcher, and the identifiable information was marked out and was masked in the transcripts and the data analysis. The researcher was the only person who had access to the collected records of information. It was stated in the IRB consent form that "If for any reason the information in the data has to be given to another party, it shall be

only with the written consent of the participant(s)” (Appendix A; in Spanish, Appendix B).

However, this was never necessary during the research process.

The information obtained from the written sources was recorded in such a way that the identity of the subject was concealed with pseudonyms or stated in generic terms, as determined by the researcher. Pseudonyms and generic terms were used for the school and organization affiliations, as needed. Pseudonyms and generic terms were implemented throughout the research process and the final documents. The participants' and related organizations' confidentiality and identities continue to be protected with due diligence in any publication or presentation that is related to this study by the continued use of pseudonyms.

Following normal timelines and procedures regarding audio recordings and data collected, I have up to five years to maintain the records in the identified secure settings (i.e. a password-protected computer or in a locked file located at the researcher's home office). Participant information, recordings, and other archives collected will be destroyed, through electronic deletion or shredding of hardcopies, once transcription, data analysis, and other research-related use is completed and the dissertation study terminated. With the precautions taken, there is no to minimal perceived or anticipated risk for participants in this study. Potential risks include the possibility of participant identification based on their responses and on the small sample size of this particular study. Possible perceived or anticipated risk or harm may affect, but is not limited to, public opinion about or the reputation of related organizations, people, or positions. Appropriate measures were taken throughout the various stages of the study to avoid risk to the participants. Overall, anticipated benefits outweighed any potential minimal risks involved. Evidence indicates that all minimal risks involved were avoided.

## **My Role as the Researcher**

As the researcher, I offered a unique perspective in this study and played a key role in the research process (Lichtman, 2013). Since the experience was directed and executed by me, as the researcher, a practitioner, and as someone who was involved in this particular case, I am not only investigating the study holistically, but also contribute unique viewpoints that contribute to the respective fields of study. I actively distinguished myself from playing the distinct, blending roles. In doing so, the complex relationship of practice and scholarship nurtured one another to generate knowledge to guide actions while making it applicable to other public contexts (Cochran-Smith, 2005).

The researcher experience and understanding of the problem, issues, and procedures are vital and connected to the system under study (Lichtman, 2013). In a traditional sense, a researcher is a silo that yields a byproduct with systematic and intentional inquiry, which ultimately creates theory (Jain, 2013; Wenger, 1998). As the researcher for this case study, I was the primary instrument responsible for following the empirical process and making decisions of moving to and fro among data gathering, analysis, interpretation, and representation while reviewing settings, making sense of the information, and constructing a reality (Kiely & Hartman, 2011; Lichtman, 2013). Descriptions, understandings, and interpretations will come from the information I gather and my aptitude in organizing and integrating them to make a meaningful whole (Lichtman, 2013). All was filtered through me and influenced by my experience, knowledge, skills, and background (Lichtman, 2013).

The traditional role of the researcher is sometimes characterized as a separate, contrastive role that conflicts with other roles within a study, especially if played by a single individual (Jain, 2013; Wenger, 1998). Yet practitioners who do not participate in empirical research or who are

incapable of implementing investigative practices in their pedagogical inquiries, in turn, are unable to contribute knowledge to their appropriate field (Cochran-Smith, 2005; Jain, 2013). There is a “reciprocal, recursive, and symbiotic relationship” (Cochran-Smith, 2005, p. 219) in which lines are blurred by being a practicing researcher (Cochran-Smith & Lytle, 2004). By engaging in research with an externalist perspective that is inclined to rationalize a phenomenon and an internal perspective through practice to understand, an individual becomes an insider through practice (Allwright, 2005; Bishop, 2005; Insider/Outsider Perspective, 2007; Jain, 2013). An insider’s social knowledge comes from a personal viewpoint with a subjective interpretation, which differentiates it from an outsider’s perspective whose knowledge of the social world is explained through the causes of human behavior (Insider/Outsider Perspective, 2007).

In this study, my point-of-view and information offered are only one perspective within the entire bounded case, but one that offers unique insight and contributions as a participant (Jain, 2013). Unable to be like the other participants within this case, I could still serve in other capacities. Rather than tainting the research, I, as a researcher who was a practitioner and an individual involved in this case, offered richness and an exclusive angle, especially as an insider who has a relationship to all other participants and an access to the case (Bishop, 2005). This enabled the trust and rapport to build and to gain more robust information. As an insider, I linked theory and practice in an intimate way (Jain, 2013). Through my multi-membership (Wenger, 1998) I could connect my roles by exploring my context in a social scientific manner, and, thus, cultivate practitioner research (Jain, 2013).

As in all qualitative research, and especially in this scenario in which I was also part of the particular case as someone who practices in the field and was involved, I must address the dilemma of biasness, objectivity, and closeness to the culture or study (Bishop, 2005; Lichtman, 2013).

Describing this part of my study as practitioner research as Allwright (2005) lays out supports the critical relationship of identity between the probed participants and myself, the person conducting the investigation. Since my knowledge was filtered through me, I must bear in mind guiding principles that could make my study doable and ethical as a way for authenticity in applying practitioner inquiry and identifying myself as a pracademic, as defined by Jain (2013). According to Jain (2013), a pracademic enables someone like me to be both a practitioner and an academic simultaneously without favoring a role. I wrote with deep reflexivity (Housley, 2012; Jain, 2013; Lichtman, 2013) and self-examination (Chapman, 2014), mostly through my journal and dialogues with my dissertation chair, as a way to discern the relationship of my roles, as well as biases and motives.

To further meet the challenges of researcher-participant bias, several steps were taken as safeguards, as described by Chapman (2014). Firstly, a comprehensive literature review, as supported by the literature presented in this study, and a range of data collection methods, as described in this study, were included (Chapman, 2014). It was obligatory that I keep strict documentation, especially with citations and references, and know all elements of my methodology (Chapman, 2014) to defend my data and methods. Secondly, I was transparent and have described the relationships involved. Chapman specifically urges that reviewers of the research be involved. My committee and editors guided me in this area and provided valuable feedback (Chapman, 2014). Thirdly, Chapman heeds quality knowledge is needed for the research to be valid and reliable. I implemented peer-reviewed journals and works related to the field.

Practitioners have conventionally been seen as those who reap the outcomes of research through application (Jain, 2013). Subjectivity may be seen as an inhibitor for objectivity. According to Lichtman (2013), bias restricts neutral judgment due to preference. Bias and partisanship may be



unavoidable, but can be mediated through diligent work, various techniques, and use of multiple sources (Lichtman, 2013). Objective reality is approximated, but with the appropriate tools, an individual can characterize one's reality objectively (Lichtman, 2013). Ethically, a practitioner-researcher perspective demands confidence, cooperation, and commonality between practitioners, letting all involved have the authority to foster personal understandings and expect others to aid (Allwright, 2005). In my study, I collected data through a methodology that allows for various types of data to be included so that all required information needed, including anything negative, was included. A qualitative approach provided a clearer picture of the planning process for an ISL initiative under development geared for adult learners in higher education, despite my relationship with the other participants.

### **Data Gathering Methods**

Since intrinsic case study is a type of qualitative research, participant and direct observation, interviews, protocols, tests, examinations of records, collections of writing samples, coding, data management, and interpretations are all ways of gathering data (Becker et al., 2012; Stake, 2005). Having a plan and using a speculative, page-allocating outline reporting process supports how the case is expressed and anticipates its components (Stake, 2005). As described by Stake (2005), case research calls for "integrated, holistic comprehension of the case" (p. 453). Interviews, archived documents, and my insider perspective were the range of tools used for collecting data.

All interviews were conducted between November 2016 and December 2016. For data collection, interviews utilized a semi-structured questioning method (Brinkmann & Kvale, 2015). This questioning method lent itself to aligning questions to the purpose of the research and the research questions during interviews. With this method, I also incorporated pre-scripted questions based on Brinkmann and Kvale's (2015) questioning guidelines and Maxwell's (2013) outlines of a

dissertation proposal as an inquiry guide for participants in the case study. There was room for flexibility to ask additional questions pending the conversation between the interviewees and myself. Refer to Appendices C and D for specific interview questions. As suggested by Forsey (2012), my first interview question asked for the participant's name and referred to their background, and my final question asked if the participant wanted to add any other comment. I provided wait time and then informed the participants that their interviews would be transcribed, per Forsey's (2012) interview recommendations.

During the interviews, I took field notes with pen and paper, as suggested by Lichtman (2013), encouraged by Forsey (2012), and heavily emphasized by Corwin and Clemens (2012). Although not mandatory, I chose to audio record the interviews, as this is a common convention since the 1960s (Forsey, 2012; Hammersley, 2012) in conjunction with my fieldnotes. Equipment used for this study included a computer, laptop, and additional equipment to record interviews. Additional equipment included speakers and headphones to listen to the recordings for transcription and analysis.

I audio recorded the interviews with a digital recorder and a backup recorder (Olympus WS-331M and a Nokia Lumina 1020 smart phone with the Mini Recorder application from the Windows store), converted them to audio files (MP3 and WMA), and played them back on a media player software application. I used the Google Voice Typing tool in Google Docs for the initial raw transcription and transcription checks, using a computer and microphone. I listened to the recordings again and used either speakers or headphones. As recommended by Hammersley (2012), transcriptions were treated with care because of their constructional role. With the transcriptions, I referenced and analyzed tangible data.

I conducted interviews one-on-one at locations preferred by the interviewees. Most study participants had university affiliation. As such, the primary research site was on a campus of the university. Travel to Peru was considered, but was dependent on funding, personal business, and work for the center for civic leadership with the university involved. As travel to Peru was unnecessary for this study, an alternative to interviewing the Peruvian research participants in-person was to conduct the interviews through a teleconference Internet-based platform. This is logical because all Peruvian partners have Skype and other social media accounts and had previous exchanges with the other 2015 ISL participants in this manner.

Some of the participants' first language is Spanish. I conducted two interviews in Spanish, which were the two Peruvian partners, the administrators of the clinic and the Peruvian school of optometry. Speaking Spanish with partners was a part of my regular tasks working with the university civic center. Speaking in Spanish was the most authentic way of collecting information from these two participants. Consent forms were in both English and Spanish. I translated other written texts into Spanish and reviewed for accuracy, as needed. Initial transcriptions were also written in Spanish with the use of the Google Voice Typing tool, and reviewed for accuracy, as well.

By enabling the feature through my Google account on the Internet with my PC or laptop and a microphone, Google Voice Typing transcribed the last four out of the nine interviews live. Google Voice Typing converted the audio from the interview into raw written text on a Google Doc. The interviewees' and my words from our verbal interaction were literally written as we spoke, with no punctuation or space formatting. The words were written as one continuous line. Periodically, the transcription stopped, and I had to reset the feature by clicking and re-clicking on the Google Voice Typing tool icon. I monitored the transcription as the interviews took place and re-enabled Google Voice Typing, as needed. The initial five interviews were also transcribed in the

recorded raw format with Google Voice Typing. In December 2016, I played back the initial five interviews on the computer, having a microphone positioned next to a speaker to catch the sound. Google Voice Typing automatically transcribed and I monitored the process.

From late Spring and throughout the Summer of 2017, I listened to the recordings again multiple times, checking the text for accuracy. At the same time, I transferred the raw Google Voice Typing transcriptions text onto Word documents and Excel spreadsheets using message units. Message unit level transcribing came from an ethnographic perspective, aiding in visibly constructing meaning into micro chunks of interactive conversations (Skukauskaite, 2012). Each unit points to a single message, in a single moment, through contextualization cues. Contextualization cues are signals where interview participants add clarity to what is being expressed and its context through non-verbal prompts and different speech dynamics (Skukauskaite, 2012). After the interviews were transcribed and organized, participants were invited to review their information as part of “member validation” (Brinkmann & Kvale, 2015, p. 222), also known as “respondent validation” (Maxwell, 2013) or “member check” (Sandelowski, 2012). Participants had the chance to express if the transcription accurately reflected their thoughts. The participant was also asked if he/she had any additional information to note “to elaborate their own original statements” (Brinkmann & Kvale, 2005, p. 222). The participant had a choice of what information he/she wanted to contribute. This was to assist me in fully capturing and understanding the participants’ experiences, to give those experiences “justice” (Sandelowski, 2012, p. 2) and to avoid misunderstanding (Maxwell, 2013). This strategy strengthens qualitative research to optimize its trustworthiness (Sandelowski, 2012).

Written sources and other organizational archives that were used for the planning process from 2014 to 2015 (prior to December 7th, 2015 ISL trip) were also included as sources of information for this dissertation and were collected throughout the data collection and analysis

phases of the study. As supported by Middleton (2012) and Prior (2012), documents in qualitative research are varied in format and purpose and offer different ways to be cross-examined. The texts related to this research contained group meeting notes, organizational documents, pre-reflections, planning records, PowerPoint presentations, emails, and a personal planning and travel journal. My journal contained logistical information, research notes, and personal reflections with reflexive components. Most, if not all, of these sources of information were created by me, as the lead coordinator for the ISL experience on behalf of the center for civic leadership of the university. These written sources of information were considered private, meso-level documents selectively read (Middleton, 2012). These documents are specific to this particular case and were chosen based on their relationship to the research question. So, out of the hundreds of generated documents produced from the initiative, only a few were actually analyzed. The selected written sources were active in coordinating what was done among ISL planning participants and demonstrate their social actions and relationships sequentially (Middleton, 2012).

### **Summary**

The purpose of this qualitative research study was to explore the beginning planning process of an ISL initiative under development at a Catholic university in south central Texas. The study sought to discover and describe what happens before ISL is designed and implemented. This investigation was designed as a qualitative intrinsic case study. It used interviews with semi-structured questions with nine participants who were involved with an ISL initiative. Other data sources included archived organizational documents and records and an insider perspective as the sources of data collection.

In the next chapter, data analysis is described, which includes the implementation of Spradley's (1980) Developmental Sequence and Taxonomy and content analysis and applied

techniques recommended by Lindsay Huckin in Bazerman and Prior (2004). A major possible benefit of the outcomes of this research is the addition of knowledge to the field of planning processes for ISL initiatives and planning programs for adult learners. Information provides understanding and insights into practices that help develop ISL. This work is to be valued not only by scholars, but also by practitioners, providers, decision-makers, and future ISL initiative coordinators and planners for adult learners in higher education.

### **Data Collection, Analysis, and Findings**

ISL studies, such as this one, support a variety of communities, including academic and the society-at-large. The ISL pilot initiative under development that I investigated served Peruvian patients with eyecare and American students and those involved with the project coordination with experiential learning. The primary inquiry for this research was to discover what is the initial planning process of an international service-learning (ISL) initiative under development that involves a collaboration between a south-central Texas private university and a ministry of Catholic sisters in Chimbote, Peru. Further, it explored ISL planning that targets adult learners within a U.S. higher education context by delving into the considerations, actions, and discussions stakeholders grapple with. Collected information came from actors who were responsible for the pilot ISL initiative under development. Moreover, the information indicated how the team developed during its first ISL experience under the leadership of the university civic leadership office, investigating the perceptions of those involved with the planning. The data collection methods, analysis, and findings made visible the multiple perspectives involved in the collaboration, including an aspect from the communities both serving and being served, and constructed the process of what occurred in this phase of planning. This chapter presents the findings of a case of an initial planning process of an ISL pilot initiative under development.

There are two methods of interpreting data: holistically or through coding (Becker et al., 2012). The difference is that evidence is either reviewed in its entirety or in parts. I made inferences with a holistic perspective at the end of the analysis, but broke down my data into two basic parts during the analysis. Even though I am looking at separate types of data sources independently, interviews and written texts, the case is one unit (Baxter & Jack, 2008). Ultimately, I cross-referenced the data, deriving to the overall represented discovered themes.

During the actual process of data analysis, as is usually done in case studies, I investigated themes, relationships, and descriptions to make sense of the data (Becker et al., 2012; Marshall & Rossman, 2011). Most of the core analysis took place throughout the summer and early fall of 2017. As this took place, I reverted to my research question and related the data to my research focus, the process of developing an international service-learning initiative that involves a collaboration between a south-central Texas private university and a ministry of Catholic Sisters in Chimbote, Peru. Typically, data analysis is done simultaneously with data collection (Baxter & Jack, 2008; Marshall & Rossman, 2011). Although this can occur, it must be noted that in this research, the interview data was collected after the actual time of the case. The planning for this particular ISL initiative took place prior to December 2015. Nonetheless, interviews, archival documents, and a journal are the three major data sources gathered and analyzed. The process for this entire study from data collection to findings took 10 months (November 2016 – October 2017). The appropriate steps were taken to ensure that the findings derived from trustworthy sources.

### **Trustworthiness**

Much of the ISL research is viewed as non-empirical, providing limited studies on theory, practice, value, and use of ISL (Kiely & Hartman, 2011). With the intention of improving the field, more reliable and valid studies are needed in the area. Kiely and Hartman (2011) state that using epistemic trustworthiness criteria, such as the evaluation of quality of knowledge production, and non-epistemic authenticity criteria, such as the assurance of quality in the process of inquiry, is an efficient strategy towards a research process that incorporates integrity in the ISL context. To ensure trustworthiness not only to my research, but to the field of qualitative research and to ISL, several measures were taken throughout this study.



First, I followed the American Educational Research Association Standards (AERA, 2006). Using the standards as a guide allowed me to think through the information that I was sharing in this dissertation so that I communicate the research essence and the importance of the findings and final product. These standards provided guidelines that built a framework of expectations that were grounded in the social sciences' empirical traditions in education (AERA, 2006). In this effort, my goal is to present prime educational research that promotes quality, trustworthy, and credible empirical research. Secondly, in casework, triangulation is generally used (Stake, 2005). By incorporating triangulation as a part of my process, I was able to clarify meaning and verify the repeatability of interpretation of multiple perceptions and sources (Lichtman, 2013; Stake, 2005). Triangulation took place by comparing written sources to the interviews and other research information gathered. The process of content analysis and discovering patterns naturally promotes trustworthiness and credibility, also known in research as validity and reliability. To further ensure trustworthiness, I identified my views on the study's topic throughout the research, including during interviews, and bracketed those views (Lichtman, 2013). This means that I identified and set aside my personal, preconceived beliefs, understandings, theories, and views.

A major possible benefit of this research is the addition of knowledge and understanding to the field of planning processes for ISL initiatives. This work is to be valued not only by scholars, but also by practitioners and providers. There was no to minimal perceived or anticipated risk for participants in this study. Risks could include the possibility of participant identification based on their responses and on the small sample size for this particular study. Possible perceived or anticipated risk or harm may affect, but is not limited to, public opinion or reputation of a related organization, people, or positions. Overall, the anticipated benefits outweighed any potential

minimal risks involved. This research reveals some insight, but an ongoing plea for research efforts in ISL planning continues.

### **Data Collection**

Two techniques completed the data collection: interviews and gathering textual archives. The interviews provided foundational information. They were conducted with the participants who were a part of the initial planning process of an ISL case. The additional data came from collected documents that were created during the planning process for the initiative. The supplemental information provided a fuller picture of the pilot initiative that was under development. Together, interviews and documents led the exploration into the patterned cultural knowledge of meaning represented orally and textually.

Through nine interviewees, who each held a different role and viewpoint, the research question and purpose were directly addressed. The data collection from the interviews for my research study ran from November 2016 – December 2016. All interviews were scheduled primarily through email. A few were scheduled face-to-face. Seven out of nine interviews were conducted locally, in person, and one-on-one. Six interviews were held indoors, one in a meeting room and five in office settings. One interview was held in an open, outdoor setting. The other two interviews, with the Peruvian participants, were conducted in Spanish through long distance, Internet-based communication tools, such as Skype and WhatsApp. Three interviews were completed in two parts. Two interviewees were called away and needed about a ten-minute break before returning to the interview. One interview was completed, but as the interviewee and I spoke informally afterwards, more related information emerged, and I asked if I could continue recording. Nonetheless, each interview was completed within one day.

Up to three devices were used to record the interviews, including an Olympus WS-331M, a Nokia Lumina 1020 smartphone with the Mini Recorder application from the Windows store, and Google Voice. This was beneficial because in one interview audio recording the sound was garbled, but what was said was recovered by the second audio recording. In another interview, neither audio recording device recorded, but Google Voice transcribed the spoken words. In a third interview, the interview was interrupted by the smartphone notification alerts. The settings were changed immediately during the interview to silence the phone and the interview continued to be fully recorded. Interviews recorded on average for approximately 50 minutes. The longest in time was one hour and about 14 minutes, and the shortest was about 34 minutes.

Some difficulties arose when connecting electronically. The Spanish interview with the Peruvian clinical administrator was conducted using Skype with no major issues. The other Spanish interview, the one with the Peruvian optometry school administrator, was not possible using Skype. Due to connection issues, instant messages and emails were exchanged. Finally, a communication application similar to Skype, WhatsApp, established a solid connection. Some glitches arose with WhatsApp which garbled the interviewee's voice and caused gaps in sound in the audio recording, but the entire interview was completed. When needed, the interviewee repeated responses. The interviewee never indicated trouble with connectivity or communication.

For both Spanish interviews, no field notes were taken due to the use of dual languages and the multi-tasking between the various pieces of technology, including the digital recorder, Smartphone, long-distance apps, laptop, and Google Voice Typing. Google Voice Typing was checked for connection and to see if it was picking up the voice through the phone applications. Google Voice Typing was completed live and in Spanish for the two Peruvian, long-distance interviews.

Four recorded interviews had the initial raw transcription completed live via Google Docs' Voice Typing tool. Using this recording text-typing feature allowed for the interviews to be transcribed simultaneously as the conversations took place. The transcription was most accurate when the sounds were clear. Clarity was based on the quality of sound and the voice of the speaker. When the microphone was close to the speaker, the sound clarity was best, making the transcription most accurate. One of the interviewees had a second language accent. For this interview, many of the interviewee's words were omitted or transcribed as a different word. Google Voice Typing has a feature to detect different languages. Google Voice Typing was enabled in English, and when needed, in Spanish.

Aside from the usage of tools and technology, the process of collection included semi-structured questioning to understand and examine the data received from participants. The guiding questions are located in Appendices C and D. All transcripts were sent via email to interviewees for member checking. Participants were given about a week to review and submit feedback, if needed. Additionally, documents and other archived sources were gathered to support interview information.

After finalizing the collection process, a systematic process to discover relationships and like patterns in the data was constructed. For the interviews, participant profiles were completed. Participant profiles include interview information with details on the person's role and their perspectives on several aspects of the ISL pilot initiative. For the interviews, I also applied Spradley's (1980) Developmental Sequence and Taxonomy, a systematic qualitative method to identify patterns. Alongside the interviews, I gathered texts related to the planning for the 2015 ISL initiative, including organizational documents and my personal planning and travel journal. I conducted content analysis on the textual data.

## Participant Profiles

As noted in Table 1, a total of nine participants provided interviews, including:

- a non-profit leader,
- the university assistant professor and vision campaign leader,
- the university civic center leader,
- a non-profit contributor,
- a university administrator,
- a university faculty member,
- the Peruvian optometry school lead administrator,
- a university student, and
- the Peruvian clinic administrator.

Individual participant information collected included participant role identities, voice or audio recordings, transcriptions, and the signed consent forms. Detailed demographic information was not recorded for this study since it did not have any direct importance. Participant roles were of most value. The emphasis was on those who provided insight and information to the process of developing the ISL pilot initiative. Some demographic assumptions were made based on participant-researcher interactions, including gender, estimated age, and ethnicity. With this in mind, five participants were female and four participants were male. All interviewees were adults over the age of 18. Two were native Peruvians who live and work in Peru. The other seven were American, but came from various races and ethnicities, including Hispanic/Latino, Asian, and Caucasian. All participants have been involved in some capacity in other past mission- or service-learning oriented trips, having experience with travel and volunteerism.

I transcribed and analyzed each participant response. A short description of the professional role is given. Further, details pertaining to the research question and interview questions are highlighted. Findings from each participant are organized into five categories:

- personal contributions, including role, responsibilities, actions, and thoughts;
- planning process;
- positive attributes and characteristics;
- collaboration with others; and
- other considerations and recommendations.

These categories represent the summary of topics covered within the interviews. Below are the participants' perspectives, presented by the interview completion sequence.

**Interviewee 1.** Interviewee 1 oversaw the non-profit organization and led immersion trips. Her organization falls under the umbrella of the religious sisters, who also run ministries in Peru. Since the non-profit and the sisters are so closely connected, many projects and ministries are interwoven between the two. The non-profit does regular work in Peru and has staff members travel there at least twice a year. Interviewee 1 is a seasoned Peru traveler with plenty of logistical and travel knowledge. Often, she leads immersion trips to the country. Thus, she had made other immersion trips to Peru prior to the ISL pilot initiative. As such, she worked closely with the university and with its center for civic leadership.

***Personal contributions – Role, responsibilities, actions, and thoughts.*** For the 2015 initiative, Interviewee 1 described herself as “the continuation of partnerships.” She and the organization established relationships in Peru over many years. She introduced the university and the civic center’s members and established the new network. For the 2014 scouting trip, she was a main point of contact and was in charge of the logistics. Throughout 2014 to 2015, she oversaw her own

objectives, but guided the university civic center and helped coordinate overlapping work and volunteers.

***Planning process.*** The planning process is based on the area that is served. Interviewee 1 follows the belief that one finds out what the community's need is, not imposing what one thinks is needed. By doing this, she stated that one can get to know the people and the histories. Doing this herself, she then plans with the partners on the ground and shares resources, making decisions based on need. "Part of our process to prepare for the immersion trips is to be in regular contact with all our partners before we go." Contact is made in a variety of ways, including face-to-face, telephone calls, email, Facebook, and Skype. However, meeting with all ISL participants for planning at the same time and in the same space is logistically challenging. Meeting and planning together "would have had some clarity as far as expectations" and makes "a traveling group a little more cohesive and responsible to each other."

***Positive attributes and characteristics.*** Interviewee 1 stated that "it was very much of a collaborative spirit." The person with the initial vision of bringing all related entities together asked for different individuals to come to the table to have a conversation, and they did. At the beginning, the vision was unclear, but by meeting, talking, and offering ideas and resources, the vision came to light. "We can really maximize what everybody brings to the table and it just works out."

***Collaboration with others.*** Things happened "organically" and "the process was fluid." She connected with partners who took on different roles. Partners were needed both in and out of the local community served. Others outside of the initiative were also needed as resources. For example, in this case, another organization that regularly hosts international guests who provide medical volunteers offered insight on what to consider. Also, local networks that were not involved for the actual planning, but were available for the actual ISL experience, were included as a factor to

account for during planning. These networks were based on natural relationships already established with some of the planning partners.

***Other considerations and recommendations.*** Scouting is important to do because there is learning about the service area, people being served, and local partners. Scouting also allows the opportunity to go ahead of time “specifically with that in mind.” The focus is to experience the actions and sites intended for a certain goal. Communication with global contact is direct and efficient. According to Interviewee 1, for the ISL pilot, scouting “was probably the best way that we could get that information.” This is important because it is different when a small immersion team goes to serve versus a large ISL group. They are unique from one another logistically. There are different things to think through, including the follow-up and figuring out what the next steps will be.

**Interviewee 2.** Interviewee 2 teaches at the university, oversees optometry clinical hours, and manages the university’s school of optometry’s outreach programs. He had many service-mission-oriented experiences within and outside of the university. From the precepts of this ISL venture, and with an invitation to represent the school of optometry, he collaborated with other schools within the university to see if some kind of inter-professional educational experience that intentionally incorporated service-learning could be done. This was a novel concept.

***Personal contributions – Role, responsibilities, actions, and thoughts.*** Interviewee 2 represented the school of optometry and was the lead coordinator and liaison for that group, including other faculty members and students. He processed the approval from the school of optometry for the group to go, providing specific travel and initiative details to his supervisors. He recruited, figuring out which students and faculty were eligible to go and who desired to go. Additionally, he initiated other logistics, such as costs, paperwork, and finalizing commitments.



Once he formed an optometry team, he interacted with them regularly, leading the logistics for the vision campaign including equipment, patient scheduling, and the flow of service.

***Planning process.*** A small group with an interest to participate in inter-professionalism was brought together by a sister who was involved with many entities participating in the ISL pilot. Part of the planning process was learning, familiarizing, understanding, and reflecting. This included learning about what is service-learning, how service-learning could look in the curriculum, and beyond. It also involved learning about how service-learning was part of the university's mission. Another component of the planning process is networking. Through the interaction of networking, people get to know one another and find out what other schools at the university are doing. After familiarity is established, the group is able to come together to figure out what structures are already in place and how to plug in. The logistics for this particular initiative needed to be deciphered because an initiative like Peru 2015 had never been done to such capacity.

***Positive attributes and characteristics.*** The scouting trip was "extremely beneficial." It was "key.... (because) it would have been much, much harder" without it. It was a way to learn about the logistics and to figure out the possibilities. "It's not the blind leading the blind." The first scouting trip "cemented" the ISL pilot initiative. The second scouting trip, by an individual from the university civic center, "helped immensely to prepare for the actual trip that was going to take place." Many questions from the first scouting trip were answered. The scouting trips also solidified partnerships. It would have been overwhelming for one entity.

***Collaboration with others.*** Many people were involved. "There are so many, so many jobs and so many things that you may not even notice that are done that have to be done by people." The Peruvian volunteers, especially, completed many tasks that may have been otherwise overlooked. It was the local volunteers that took care of much of the logistics on the ground, dealing

with the patients and patient flow, meals for the university volunteers, and transportation. They also worked in the clinic during the ISL project. Additionally, they gave insights into the culture.

Interviewee 2 did not become aware of all of the Peruvian partners and the people power they provided until post-trip. Similarly, Interviewee 2 credited the university civic center stating that

(it) was hugely responsible for calling all the planning, the organizing, the scheduling, pulling us all together, taking a lot of pieces, parts of all the financial aspects. There was just a million and one little details that they took care of.

Individuals filled in gaps for others and co-constructed the experience. Partners and their contributions were invaluable and appreciated.

***Other considerations and recommendations.*** As a pilot initiative, many lessons were learned. This experience, although like other mission or service-oriented trips, in some ways was also unique, requiring flexibility and understanding that this was the first trip of its kind. Much emphasis was given to logistics, but just as important as the logistics was being intentional with the actual service-learning component. Preparation and time were needed to emphasize and define service-learning and its potential effects on individuals, especially with students. Vast emotions were tied to the experience. Having an awareness of service-learning reaps its full benefits. Service-learning awareness could be done by having many student meetings, pre-activities, deep pre-reflection, and instilling the primary purpose of attending the trip and its expectations. It was also helpful to have the students understand how they integrate with other ISL partners and how student contributions are made.

**Interviewee 3.** Interviewee 3 led the university civic center. She worked closely with partners within and outside of the university. Her primary responsibility was to help the university strategize community service, engagement, and leadership. The civic center is involved in work locally, regionally, and internationally. She led the office's support of service-learning. Although

involved in other international projects, the Peru initiative was the first of its kind that the office was spearheading. She helped set the vision of what it should look like.

***Personal contributions – Role, responsibilities, actions, and thoughts.*** Interviewee 3 played a supportive role. She participated in the first scouting trip and took detailed notes regarding logistics. She oversaw the details of the initiative, keeping tabs on partners, participants, finances, travel, and service. She connected the dots between the ideas and the realities, while bringing people to the table and asking questions that needed answers.

***Planning process.*** There are three main “keys” for the planning process. First, it takes time. “You can’t do it at the last minute. You have to plan in advance and communicate with potential partners in advance so that the executions and implementation of, you know, the course is successful and smooth.” Second, during the planning process, you are doing the “leg work” and finding the fit with others to partner up with, which takes “advanced communication and collaboration.” Making the effort to connect with partners is essential. The networking and interacting with other interested parties is the “leg work.” The third key is having “at least one face-to-face kind of exploratory visit prior to implementing the service-learning program ... scouting is important because it really helps you see, smell, touch, feel, whatever.” Sensing the environment before bringing the students makes ideas more concrete. Following up on scouting, especially for this case, was groundbreaking. This was a new initiative. There was a learning curve to overcome.

***Positive attributes and characteristics.*** An additional key was “the spirit of collaboration.” Overall, the interactions and relationships between the planning partners were “inclusive, collaborative, communicative, (and) respectful.” The university center served as a facilitator, but no one entity took over or forced any methods. Everyone brought their gifts and

shared their area of expertise. Partners relied on one another's experience and willingness to commit to the project.

***Collaboration with others.*** There were many meetings with many people. Through different forms of communication, partners thought through many of the logistics, and together figured out what was going to be done during the ISL travel time. Such topics included the itinerary and who would be working with whom on what projects. Some partners chimed in via Skype to share information, such as details in Peru, or to provide cultural and community information.

***Other considerations and recommendations.*** When a project is under development, and has never been done before, there is a learning curve. Partnering with others who have prior experience or already existing relationships helps to open doors. Students were included in the planning process to some capacity. They were most involved in the planning for the vision campaign. It would have been helpful to gain more of their insight on other aspects of the initiative. More inclusivity would give them a better idea of all the working pieces involved and a deeper understanding of the expectations. Another critical component to consider is being intentional about reflection.

**Interviewee 4.** Interviewee 4 was involved with the non-profit organization for many years, starting off as a volunteer, and eventually becoming a paid employee. As her roles evolved, so did her responsibilities. Some of her work for the non-profit included being an office administrator and the missionary program coordinator.

***Personal contributions – Role, responsibilities, actions, and thoughts.*** For the Peru 2015 initiative, Interviewee 4 took part in the very early stages. She attended the preliminary meetings. During those meetings, she took part in discussing ideas, wants, needs, and how they could “merge.” Interviewee 4 also helped coordinate the December 2014 scouting trip, and led the

May 2015 trip on behalf of the non-profit. She supported the university civic center personnel doing a follow-up scouting trip during the May 2015 trip. Interviewee 4's role was mostly administrative, having to take care of logistics and travel before, during, and after the scouting trips. She also served as the liaison between the university and Peruvian clinic.

***Planning process.*** Planning involved many conversations and meetings. One of the focuses during the meetings was the scouting trip that focused on providing vision care. A lot of back and forth happened between the global partners. Peruvian partners, including the clinic and the affiliated missionaries, completed much of the groundwork, securing locations and managing places that would be visited.

***Positive attributes and characteristics.*** Interviewee 4 involved an intern from the university's Ph.D. program. By involving a graduate student, additional tasks were completed and special projects initiated. The doctoral student created an immersion guide for the non-profit organization that was used to prepare travelers during 2014 and 2015. The guide included references and resources with travel information, protocols, and reflection guides. It ultimately informed participants of the mission and vision and of what to expect, framing many aspects of the ISL pilot project under development.

***Collaboration with others.*** Collaboration involved different modes of communication, such as Skype. Partners figured out logistics together, such as legal aspects of practicing medical services in Peru. By sharing information, the team could decide what would actually be done as part of the service.

***Other considerations and recommendations.*** A contribution of the non-profit organization was providing background knowledge, expertise, and a preparation outline. The university piggy-backed from the tracks already laid by the non-profit. The non-profit itself extended

an already existing relationship, the relationship of the religious sisters serving in Peru. The organization set the model of co-planning and co-constructing. One way to enhance the inter-global connection is to have an external evaluator, an outsider who will ensure that goals and objectives set are met.

**Interviewee 5.** Interviewee 5 oversaw civic engagement for the entire university, including its professional schools, such as the school of optometry. Her responsibilities encompassed managing the office of civic leadership and the office of sustainability. As a leader of the university, she was involved in high level strategic planning and evaluation, including in the areas of service-learning and internationalization. She helped promote “the mission and vision of the university in relationship to providing service to underserved population and looking at the common good and social justice issues.” It was the call of helping, the need of the people of Chimbote for eye care, that guided her decisions. The administrator believed that the university needed to safeguard that students who travel abroad understand where they are traveling to, the culture, the geographic area, the context, the people, and the collaborating agencies. Learning offered was active, pragmatic, and transformative when engaging in service. The offices she oversaw aid in preparing students to be “informed citizens of the world.”

***Personal contributions – Role, responsibilities, actions, and thoughts.*** The role of the university administrator during the planning process was supportive, “seeing the big picture and ensuring that we are touching base with all the players and ensuring that our students are aware of the requirement of the reflection piece.” Her responsibility was overseeing the overall mission of the project and warranting that the execution was aligned with the university’s mission. Additionally, she saw herself as the one who made sure all of the partners had a voice in how the trip proceeded. She was conscious of the thoughtfulness of the team’s long-term contributions and the understanding

needed before involving students. Actively, she talked with the director of the university civic center and the staff person assigned to the project.

***Planning process.*** Interviewee 5 was not directly involved in the planning process details. The university civic center, which the administrator oversees, had “a person that was assigned to pull the collaboration together and the logistics for the trip in coordination with the director (of the non-profit) in collaboration . . . and of course the actual clinic in Chimbote.” The administrator listed a number of specific partners involved in the ISL pilot in general.

***Positive attributes and characteristics.*** Interviewee 5 viewed “having a good relationship” with the non-profit as something that worked well. This is because the university and the non-profit are ministries of the same order of religious sisters. Through the ISL pilot, these U.S. ministries were going to a global ministry of the sisters in Peru. All ministries are based on “the same foundational mission and Catholic social teaching.” By having the same foundation, the program “could just go forward without having to hesitate.” All entities had the same mission.

***Collaboration with others.*** Interviewee 5 named the non-profit organization as the initial collaborator of the Peru 2015 initiative. It was the non-profit that had been working with local Peruvians. There was an already established relationship between the non-profit and the ministry of the religious sisters in Chimbote. The university aided an existing need expressed by the sisters in the area, healthcare. “So, we were an added value to an existing relationship.”

***Other considerations and recommendations.*** The initiative was a large, time consuming project. Many personnel were needed to concentrate on distinct aspects, such as a person to solely work with the logistics and someone else to work specifically with the students and their transformation via reflection. Serious, deep reflection itself should be emphasized, could have been deeper for this initiative. Also, due to the size of the project, an initial meeting for the group to

establish the major focus of going international was important. Having a meeting with the travelers and other initiative participants is another reflective component to think about the effect of learning and teaching both for students and faculty. The leaders involved in planning needed training to address: (1) the purpose and sustainability of the trip and its efforts; (2) defining a project's long-term plan; and (3) finding out the "fit" with partners outside of the university and their plans. Before moving forward and making further commitments to Peru, or any ISL project, a minimum of a year is needed to develop a good protocol for any mission trip so that all expectations are clear; a strategic, sustainable plan established; and strong relationships formed. The pilot initiative under development documented the needs of the service area; demonstrated what resources were needed and questions needing answers for such ventures; and provided a recognition of the need for a long-term plan.

**Interviewee 6.** Interviewee 6 was a faculty member at the university, working in both the academics and the clinical side. He had experienced other university vision mission initiatives and served internationally outside of the university, as well.

*Personal contributions – Role, responsibilities, actions, and thoughts.* Interviewee 6 contributed his experience and expertise to support Interviewee 2, university assistant professor and vision campaign leader, with setting up vision campaign logistics and coordinating the clinic. His role focused on the optometry aspect. The logistics for the vision stations' setup was basically the same set up used at another university service mission initiative in another country. The stations were simply modified to fit the Peruvian context. Interviewee 6 also prepared equipment and ordered the glasses, frames, and lenses dispensed during the vision campaign in Peru.

*Planning process.* The faculty member first became involved with the case when he expressed his passion and interest in participating in mission trips to Interviewee 2, who oversaw



community outreach for the school where they both taught. Since the faculty member had similar ISL-related experience, he adapted other models that he was familiar with for the unique, first-time Peru 2015 project. He spoke to people from similar programs to get as much information as possible, which was time consuming. It took almost a year to prepare. During the course of the year, Interviewee 6 met and spoke on a regular basis with Interviewee 2 and worked very closely with him, especially as the trip neared. The main topic was the logistics of the vision campaign. Even though the faculty member and another faculty member who also traveled to Peru in 2015 met all students participating in the project and supported them, the vision campaign leader met more often with them. The vision campaign leader was also more in charge of communicating with other partners and in “orchestrating the whole team.” Interviewee 6 attended other meetings, as well, such as the ISL team meetings.

***Positive attributes and characteristics.*** The interaction among everyone who was involved was positive. Talking and communicating with others from different areas of the university’s main campus was “encouraging and wonderful.” The overall preparation for the pilot was also viewed positively.

***Collaboration with others.*** Interviewee 6 felt his experience and opinions were valued by the vision campaign leader. The feelings were mutual. The two consulted with one another in every aspect, and not only in terms of preparation, but also on a personal level. Having a friendly relationship in and out of their professional lives, Interviewee 6 stated:

We definitely prayed for the mission trip and we definitely involved family member(s), friends, church friends to just be ready mentally, spiritually, and physically. So, it wasn't just like us. We involved people outside of our community to just, you know, support us.

***Other considerations and recommendations.*** Due to the context of the 2015 pilot and the uncertainty involved, having someone who goes beforehand to the location is necessary to

investigate the new place and to bring that knowledge back to the logistical preparation, as was done by the vision campaign leader. Similar to one of Interviewee 2's comments, emotions were also tied into the ISL experience. An ISL participant's attitude towards the experience and the activities involved, such as reflection, is dependent on how the students feel about it. Preparing students and sharing "a unifying goal for the trip" can make the ISL trip more successful. This way, everyone involved is "on the same page."

**Interviewee 7.** The Peruvian optometry school administrator's first interaction with the U.S. university was meeting the school of optometry's dean at an international conference. As a primary leader at his school in Peru, one of his many responsibilities was to make strategic planning decisions for his school, setting the school's vision and goals. With this responsibility, the administrator brought in new ideas and practices by connecting to and learning about outside people and networks. If he believes that there is a fit between outside entities and his school, he courts partnerships. Additionally, he authorized the process needed in approving special projects. Another responsibility was to seek learning opportunities for students. His school is in Lima, Peru. He sought partnerships to enhance student learning experiences for adult learners and has participated in other health mission trips. It was the Peruvian optometry school administrator's first cooperative venture with the U.S. university and Peruvian clinic involved in this ISL pilot initiative under development.

***Personal contributions – Role, responsibilities, actions, and thoughts.*** The administrator of the optometry school in Peru was mostly responsible for partnering with other members as a collaborative liaison that connected to the network in the ISL pilot initiative in Chimbote. Interviewee 7 worked closely with the university's civic center's ISL initiative coordinator and the Peruvian clinical administrator. He was critical in connecting communication between these organizations. Additionally, he coordinated logistics in Peru, such as bus travel from Lima to

Chimbote and obtaining required permissions from the government health administration to perform the mission work in the country. For this specific initiative, he conducted the groundwork needed for implementation and supplemented efforts that others were also working on. For example, he recruited two other volunteers to assist with the vision campaign. Being a native professional working in the optometric field, he was essential in providing knowledge and working with the clinic administrator in Chimbote. He felt that it was his role, as lead administrator of his school, to learn about and create guidelines and to implement new initiatives quickly.

***Planning process.*** The administrator emphasized the importance of discovering what others do, connecting with these people, and aligning with his school. He stated:

Es fundamental a aprender. Yo cuando visito escuelas, o ver con personas, aprendo muchísimo. Aprendo de las experiencias, de la gestión que hacen ellos. Entonces voy mirando todo. Porque voy mirando cada proceso y ese aprendizaje es a medida de nuestras posibilidades o presupuestos.

It is fundamental to learn. When I visit schools, or meet with people, I learn so very much. I learn of the experiences, of the management that they do. Then, I get to see everything. Because I am looking at every process and matching that learning to our possibilities or budgets.

After meeting with many people from one of the conferences he attended, he responded to an email, which was from a dean at the university involved in the pilot initiative in this study, accepting an invitation to consider a collaboration. Then, he traveled to scout the U.S. university, and decided it was a good match for his school. At that point, he networked with the appropriate channels to get involved with the ISL pilot initiative.

***Positive attributes and characteristics.*** Vision campaign logistics, the service done, were one of the most positive attributes and characteristics. One of the aspects that worked well, as noted by the Peruvian school administrator, was the fact that the U.S. optometry team took all necessary optometric tools needed to conduct vision screening and exams manually and with special

equipment pieces. Planning to have manual backup equipment proved essential. It was evident when a setback occurred with the Peruvian customs agency. Not all luggage with equipment passed inspection at the airport when arriving in Peru. The U.S. team still conducted all necessary vision tests at the vision campaign with the personal equipment that each optometric person brought, in addition to a few other pieces of equipment. The quality of service to the patients was not affected. The other logistical matter that was also positive was the translation between the languages, English and Spanish. Most of the volunteers from the U.S and Peru had basic language skills in the opposite language. Additionally, Interviewee 7 was impressed by the respectful bedside manner of the U.S. optometric team, stating that the professional-patient interaction was something learned.

***Collaboration with others.*** Interaction and communication between partners worked well, positively fostering collaboration with others. It was clear what each partner's intention was and what service was going to be performed. Despite the collaboration going so well for the pilot, it is an aspect that could be enhanced, but he did not provide specific suggestions.

***Other considerations and recommendations.*** It is important to learn about the proper government laws, conduits, and processes of the countries involved. This affects luggage, equipment, and other materials and resources brought into the country receiving the service. It is just as important to know the paperwork that is necessary to complete for travelers and permits. A second recommended consideration is to expand ways of thinking about service, especially for healthcare. More brainstorming is needed to figure out ways to integrate other health services.

**Interviewee 8.** In 2015, Interviewee 8 was a fourth-year intern who went on the ISL pilot trip as a university optometry school student intern. As an intern, he provided eye care to the Peruvian patients. Although there was an opportunity for students to receive academic credit or required graduation service hours for going on the Peru 2015 trip, Interviewee 8 went as a volunteer.

He saw it as a chance for personal and professional development. Prior to the ISL pilot, he participated in other similar missionary experiences outside of the university.

***Personal contributions – Role, responsibilities, actions, and thoughts.*** Interviewee 8's role was mostly based on the groundwork needed during the vision campaign in Peru. He mainly participated in attending meetings and completing pre-trip reflections prepared by others. Since he was a student, he and the other students "mainly just talked about logistics with our professors . . . (we did) the logistics in the actual vision care."

***Planning process.*** During the planning period, Interviewee 8 did not work directly with the other partners outside the university. However, he and other students met and spoke with the optometry professors also traveling to Peru. All optometry school participants shared their ideas and provided feedback, in particular with regard to the vision campaign logistics. For example, they discussed what stations would be needed. Even so, Interviewee 8 stated: "It's difficult to plan ahead of time a lot of these things because we don't exactly know what space we're going to be having and we can't know that until we get there." He also stated that, perhaps because the Peru 2015 initiative was a pilot, students actually had a little bit more input than if it were already established.

***Positive attributes and characteristics.*** Reflection was an important aspect of the experience to Interviewee 8. This topic arose several times within the conversation, especially at the beginning. He said it was emphasized before, during, and after the trip. Interviewee 8 stated that "it (pre-reflection) was certainly impactful." The pre-reflection questions given during the preparation period of the ISL initiative directed one's own personal thought process and helped to frame what was going to be happening, preparing his state of mind to understand the service and area of travel. ISL is not study abroad, nor is it tourism. ISL is to serve. Overall, Interviewee 8 thought the

preparation and planning were well done. Meeting as a whole group was an important aspect of the pre-trip planning.

***Collaboration with others.*** Most of the interaction and collaboration were done within the team who were preparing the vision clinic aspect of the initiative. There were some other meetings with the larger team, as well.

***Other considerations and recommendations.*** It is important to understand why one is participating in an international service-learning opportunity. Reflection and, especially, sharing pre-reflection, is a way to process that understanding and “build team mentality, as well” before engaging in ISL at the site. No one can force another to reflect, but only offer the opportunities to do so. A student can take advantage of practicing newly learned skills and the possibilities of learning from the service and the issues connected to the service. It is also helpful for students to understand the entire picture of the project and all the partners involved. This includes balancing time between service with cultural experiences by way of recreation, tourism, and carving out time to visit the sites of the country of service. According to this interviewee, in this case there was a desire to have cultural experiences by way of having opportunities to be a tourist, learn outside of a classroom, and experience the popular, recognizable sites of Peru, such as Machu Pichu. Despite the additional expenses, time constraints, or logistical challenges, Interviewee 8, as a student, suggested giving participants options to choose possible accompanying cultural encounters. Someone with that kind of knowledge could present the potential supplementary travel. When comparing this experience to similar experiences, Interviewee 8 noticed that the differences were in the overall context of each experience. The Peru 2015 experience was a first-of-its-kind collaborative and smaller in scale compared to his prior experiences.

**Interviewee 9.** The Peruvian clinic administrator worked alongside the religious sisters who founded the clinic. She was responsible for the entire clinic located in Chimbote, Peru and oversaw all services, including care held out in the community, such as a program that monitors the developmental milestones of infants and young children. Additionally, Interviewee 9 collaborated with other ministries of the sisters, including the hospice that is also located in Chimbote and the non-profit organization included in this study. Although the administrator worked previously with the non-profit organization, including with its missionary program, the ISL initiative in this study was the first time that the administrator worked so closely with the university. As a key participant, Interviewee 9 was directly involved in making decisions in the planning of the ISL initiative. This person was primarily involved in coordinating help, personnel, and logistics in Peru.

*Personal contributions – Role, responsibilities, actions, and thoughts.* The Peruvian clinic administrator revealed that her primary role was to coordinate with the other ministries, such as the clinic and hospice, in order to prepare the activities that the university was going to implement. She worked closely with the university civic center’s ISL initiative coordinator to gain information and explanations about what the university was wanting to do, with whom to network, and to coordinate planning meetings and team collaborations from both countries. Interviewee 9 indicated that people and relationships guided her decisions and actions. She stated:

Nos motiva que gente, gente buena como ustedes pueden ayudar nuestro país. La disponibilidad del personal de ustedes y también la disponibilidad que tenía el equipo de acá de nuestros ministerios para poder participar, para reforzar los lazos con trabajos que deben realizando con otros ministerios como ustedes para poder ayudar a nuestra gente.

People motivate us, the good people like you can help our country. The availability of your personnel and also the availability of our team from our departments to be able to take part, to reinforce the bonds with works that should take place between our ministries in order to help our people.

***Planning process.*** The Peruvian clinic administrator provided her description of the planning process that took place before the 2015 ISL initiative. She referred to interactions that involve communication, networking, and co-construction. She also mentioned actions of coordination, especially pertaining to logistics and groundwork for the vision campaigns.

***Positive attributes and characteristics.*** The aspects that worked well, or could have been changed to work better, during the planning process for the initiative under development included different ways to build rapport and positive person-to-person interactions. She liked the way Peruvian vision patients were treated, the way the team came together from both countries, and the positive work environment.

***Collaboration with others.*** Interviewee 9 described the collaboration positively. Partnerships are important to establish.

***Other considerations and recommendations.*** She recommended planning in advance time before the initiative execution. Also, the timing of the seasons was another consideration because it affects how the volunteers work.

***Participant profile summary.*** The participant profiles detailed all nine individual interviews. Each interview gave insight into one member of the ISL pilot initiative planning team. This provided more of a single perspective, like a single puzzle piece. Each participant added diverse dimensions to the initial planning process of the ISL pilot initiative under development by providing different perspectives.

Each interviewee's role was distinct, but integral. Even though there were differences in their titles, roles, and responsibilities, there were also commonalities. Six interviewees were leaders and/or administrators of their organization or department. Most, seven out of the nine participants, mentioned that their roles involved a logistical component. Three interviewees perceived their roles



as supportive. The types of work that the participants carried out often overlapped. For example, four out of the nine interviewees acted like liaisons. Out of that same group of nine, six mentioned having some sort of coordination responsibility. No matter who was who or who did what, all were involved in the initial planning process.

The planning process involved some sort of interaction among all members, including networking, communicating, and meeting. Part of the process also included the idea of becoming familiar with or understanding. For instance, scouting, getting to know others involved, and becoming aware of the service needs were involved in the process. The process was described as time consuming and layered with various logistical components, from travel and the vision campaign to coordinating communication and setting up meetings.

Positive attributes shared about the pilot ISL initial planning process mostly centered on collaboration and building or strengthening organic relationships. The interaction was respectful. Individuals made contributions and communicated their thoughts. Those involved co-constructed the process, helping out in the various areas. Scouting, preparation, and logistics were also described as positive attributes and part of the collaboration in the initial planning process of this ISL pilot initiative.

There were other considerations and recommendations for the planning process for the ISL initiative. One was the fact that this pilot was under development. It had never been done to this capacity with these entities. It was time consuming, but necessary to understand all involved, especially the service-learning piece.

Overall, through the participant profiles, it was demonstrated that the case developed mostly through rapport, interactions, and collaboration. Some ideas or concepts, such as scouting, meetings, and logistics, sprinkled throughout the five focused topics. A summary of the analysis abridging the

participant profiles is listed in Appendix G. To hear the group as one unit and to find commonalities between the members, further analysis was applied, as laid out in the next section.

### **Interview Analysis and Findings: Application of Spradley's (1980) Developmental Sequence and Taxonomy**

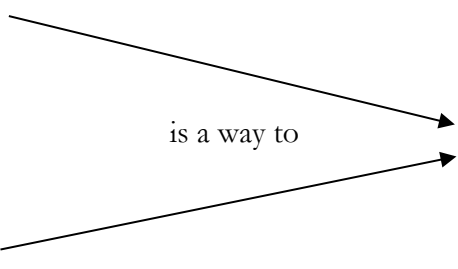
For the interview analysis, I utilized the prescribed systematic methods of data analysis by Spradley (1980). Although used for ethnographic analysis and observation, I adapted it to fit my intrinsic case study and interview transcripts. The Spradley (1980) Developmental Sequence and Taxonomy model applied uncovered small patterned elemental units of cultural knowledge that created categories of meaning, or cultural domains. Since cultural domains are comprised of language usage (Spradley, 1980), the domains for this study derived from the transcribed interviews, using the participants' language. At this first level of analysis, included terms, semantic relationships, and cover terms are linked. Taxonomic analysis, componential analysis, and theme analysis follows.

**Domain analysis.** To dissect the categorized cultural meanings for this study, I began by looking for included terms that originated from transcribed interviews and my field notes. Analysis for this process was organized on an Excel spreadsheet that contained the interview transcriptions, broken into message units (Skukauskaite, 2012), and developed on a worksheet that originated from handwritten notes in my spiral notebook. Artifacts from the working analysis are documented in Appendix H. Significant message units with basic units of information (Spradley, 1980) were given names. Names for all the small categories, or in this case, the message units, inside the domain are called included terms (Spradley, 1980). Included terms were isolated and congregated into meaningful expressions that delineated from the data through a semantic relationship, a linking phrase (Spradley, 1980). In this analysis, I used one of Spradley's (1980) listed semantic relationships, "is a way to" (p. 93). This linking phrase defines a means to an end. "X is a way to do Y" (p. 93). For this semantic relationship, "x" and "y" were verbs.

I merged similarly natured included terms via semantic relationships into one category of meaning to develop a cover term. Cover terms are the names for the cultural domains (Spradley, 1980). The cultural domains that emerged in this study are mixed domains (Spradley, 1980). I integrated language samples from my participants, folk terms (Spradley, 1980) with my own termed labels, analytic terms (Spradley, 1980). Figures 11 through 14, in the next subsections, display how the included terms on the left are equally grouped into one category on the right, then processed through the semantic relationship to identify a cover term. Spradley (1980) states that the systematic process lasts throughout the analysis of collected data.

***Domain 1: Share individual contributions.*** As seen in Figure 11, there are four ways to share individual contributions. Individual contributions are what each person brings to the group and discloses as a means to provide for the group. Each person of the studied initiative added to a collective contribution. Interviewee 6 stated, “I think the main role was to provide our expertise in optometry.” The collective contribution included individuals bringing in their expertise, as well as their past experiences. Eight out of the nine interviewees said that they had participated in initiatives, such as health mission trips, similar to the ISL pilot. Interviewees referenced their past experiences when making comparisons or using those past experiences to make decisions for the Peru 2015 initiative. Those present were able to participate and give. Thus, the first shared contribution were individuals’ expertise, knowledge, skills, and presence. Second, sharing individual contributions included performing roles and responsibilities. All participants described ways in which they, themselves, or others performed a role and took on responsibility. An example of this was Interviewee 1 describing her role in carrying out travel logistics for a scouting trip and Interviewee 8 describing the roles and responsibilities of those involved in the vision campaign. Third, it was expressing personal needs or desires, as well as feedback. An example of this was when Interviewee

7 spoke of his intentions of participating in the initiative. He was desiring to learn more about this project to see how it could be implemented in his school. Last, having people power, or volunteers to help in one part, was a way to share individual contributions.

Included Terms	Semantic Relationship	Cover Term
Bringing in expertise, knowledge, skills, & presence	 <p>is a way to</p>	Share Individual Contributions
Performing roles & responsibilities		
Expressing personal needs, desires, or feedback		
Providing volunteered people power to help in one part		

*Figure 11.* Domain 1. Demonstrated is Spradley's (1980) Domain Analysis Model as it is applied to Domain 1. Based on the nine interviewees' transcriptions, four included terms linked to a cover term through a semantic relationship to identify this cultural domain.

***Domain 2: Create cooperative group dynamics.*** In this case, creating cooperative group dynamics was prominent in a variety of ways, as seen in Figure 12. Learning and following expectations was one way to create a tight group. Interviewee 2 stated:

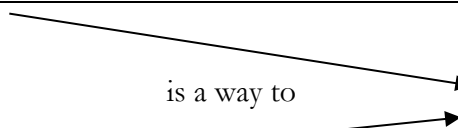
It was a learning process for me to learn what is service-learning and how can that, what can that look like for optometry and beyond? So, in finding out that it was really part of the mission and intentionality of (the university) to promote and be a little more intentional.

Interviewees 3 and 4 extended the group's vision and mission to the charisma of the religious sisters who founded the multiple organizations involved. A total of eight out of the nine interviewees referenced vision and mission. Expectations, such as the vision and mission, set the purpose and goals for the initiative. Exposing the group to the expectations brought an awareness and a known framework for participants to follow. Along with the learning of expectations came an understanding, as stated by Interviewee 5, that "we're not having to explain why are we all doing this." However, there was an understanding of many things that promoted cooperative group

dynamics, such as the entities involved and how to interact with those entities. Interviewee 5 also stated:

We have to really be thoughtful about what is our contribution long-term. And that requires an understanding of the country, understanding of what are the health care priorities set by the government, and what is the relationship of the agency to the government, and to those priorities.

Understanding thus required getting to know others and building and maintaining rapport with all involved for cohesion to unfold. Ways in which ongoing relationships happened included interactions, such as following-up after meetings or discussions with partners and having team building experiences, such as the commissioning ceremony. Four interviewees spoke of building and maintaining rapport by way of nurturing natural, magnetic, organic relationships. An example of this was when Interviewee 2 spoke of the first scouting trip: “And it turned out that we could leverage a little bit of the existing ministries of the hospice that was already down there.” Interactions between the partners not only developed relationships, but also aided the process of co-construction. Partners providing feedback and opinions, reciprocating exchanges, and participating in activities were ways to co-construct, and to ultimately support the creation of cooperative group dynamics.

Included Terms	Semantic Relationship	Cover Term
Learning & following expectations	 is a way to	Create a Cooperative Group
Understanding		
Building & maintaining rapport		
Co-constructing		

*Figure 12.* Domain 2. Demonstrated is Spradley’s (1980) Domain Analysis Model as it is applied to Domain 2. Based from the nine interviewees’ transcriptions, four included terms linked to a cover term through a semantic relationship to identify this cultural domain.

**Domain 3: Collaborate.** As seen in Figure 13, collaboration was used for the initial planning process for this ISL initiative that was under development. Five major ways derived as ways to collaborate. The first way to collaborate was by partnering, meaning to connect to networks

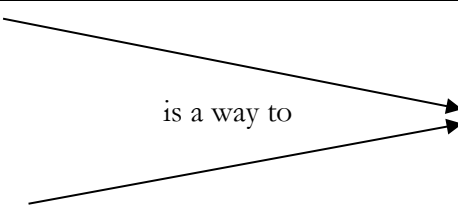
and others desiring similar interests and mutual goals. For example, Interviewee 9 spoke of the first scouting trip and how the university came to Peru with the non-profit organization and explained their intentions to coordinate vision care in Chimbote. The non-profit's network extended between the other two ministries, the Peruvian clinic and the south-central Texas university, to connect to fulfill the goal of providing healthcare. Interviewee 1 was the initial liaison in the partnership. Acting as a liaison was also a way to partner to promote cooperation among collaborators. Problem solving with others was a second way to collaborate in the initial ISL planning process. Working with colleagues to figure out questions, unknowns, and uncertainties brought forth teamwork, and ultimately, collaboration. A third way to collaborate was by bringing together people and ideas. The important aspect here was to connect and align. Interviewee 9, again, stated how her network in Chimbote and among the religious related ministries and the local community pulled together to align and connect for the upcoming vision campaign, “y para poder elaborar estrategias de poder beneficiar a la comunidad .... Se elaboró la estrategia entre los ministerios, la congregación, y la parroquia” (“And to be able to prepare strategies to benefit the community.... A strategy was prepared between the ministries, the congregation, and the parish.”) Communication was also essential to collaboration. Participants mentioned various ways to communicate, including via technology (i.g. Skype, email, etc.), having a common language, through written reports, over long distance, and through talking with others. Communication allowed for conversations and discussions to be held. Finally, meeting was mentioned by all participants. Meeting forms mentioned were in person and virtually. The point of meeting was to be in one shared space and time so as to have live exchanges. As Interviewee 7 stated: “(Es) importante de conocer les, ¿no? Pero en persona, de cara a cara” (“It is important to get to know each other, right? But in person, face-to-face.”).

Included Terms	Semantic Relationship	Cover Term
Partnering	<p>is a way to</p>	Collaborate
Problem solving		
Connecting & aligning		
Communicating		
Meeting		

*Figure 13.* Domain 3. Demonstrated is Spradley’s (1980) Domain Analysis Model as it is applied to Domain 3. Based from the nine interviewees’ transcriptions, five included terms linked to a cover term through a semantic relationship to identify this cultural domain.

**Domain 4: Prepare.** There were six ways to prepare that emerged in the initial planning process of the ISL pilot initiative, as seen in Figure 14. The first way to prepare for the pilot initiative’s initial planning process was through thought processing, or thinking through. This was by means of being intentional and through the practice of reflecting. This included finding a fit and others with the same attitude, brainstorming, and being conscious and aware. This is exemplified in Interviewee 3’s statement, “when our team sat down and really thought about where we would start, it just made sense to continue to align ourselves with the ministry of the sisters.” A second a way to prepare was to create a guide to learn about what ISL is, having rules, location, purpose, action steps, training, procedures, etc. Logistics, especially for travel and the vision campaign, as well as doing the groundwork to make everything happen consistently, appeared frequently. Logistical aspects included coordination for organizing, sharing information, and designating time and commitment for implementation and sustainability. Preparation was described as time consuming by five interviewees. Having prior mission experience was also seen as useful to preparation. One type of preparation experience that was present in eight out of the nine interviews was scouting. Scouting allowed for exploration; discovery; sensing; familiarizing; learning about or investigating a context, people, and environment; and traveling, usually within large distances.

Figure 14. Domain 4

Included Terms	Semantic Relationship	Cover Term
Thinking through	 is a way to	Prepare
Creating a guide		
Doing groundwork		
Having experience		
Scouting		
Coordinating logistics		

*Figure 14.* Demonstrated is Spradley's (1980) Domain Analysis Model as it is applied to Domain 4. Based on the nine interviewees' transcriptions, six included terms linked to a cover term through a semantic relationship to identify this cultural domain.

**Taxonomic analysis.** After thoroughly exhausting the search for included and cover terms, the systematic process turned to identifying the domain analysis into a taxonomy. Taxonomy is a classification of meaning that examines each domain analyzed for a common classification term, very similar to the process of linking included terms to cover terms with a semantic relationship (Spradley, 1980). A taxonomy zooms above the domain analysis and exposes a macro-view with all its subsets and their associations. Taxonomic analysis "involves a search for the way cultural domains are organized" (Spradley, 1980, p.87) and "shows more of the relationships among the things inside the cultural domain" (Spradley, 1980, p. 112). This, in turn, promotes an understanding of cultural meaning. Spradley (1980) states, "Cultural meaning arises, in part, from the way things are organized, the way they are related to one another" (p. 112). In this case, the gained insight was into the sub-culture of ISL planning.

I identified four cultural domains, shared individual contributions, creating cooperative group dynamics, collaborating, and preparing. With these four domains were 19 accumulated actions, or ways. To gain an aerial shot for the macro-view to see how all terms are related, all these actions, or ways, are incorporated in a larger domain by a single semantic relationship, "x" is used for "y." In this case, these were identified ways used for the initial planning process of an ISL pilot



initiative under development. Figure 15 depicts the taxonomy “is used for” with its three different “levels” (Spradley, 1980, p. 115). Like Spradley’s (1980) model, level one of Figure 15 is the top level on the left, followed by more specific terms at the bottom level, going right.

To analyze the taxonomy more comprehensively, Spradley (1980) lays out additional steps, which includes looking for additional included terms and searching for larger, more inclusive domains that might include subsets, as well as drafting a tentative taxonomy followed by making focused observations in the field.

Initial Planning Process of an ISL Pilot Initiative Under Development	Share Individual Contributions	Bringing in expertise, knowledge, skills, and presence
		Performing roles and responsibilities
		Expressing personal needs, desires, or feedback
		Providing volunteered people power to help in one part
	Create a Cooperative Group	Learning & following expectations
		Understanding
		Building & maintaining rapport
		Co-constructing
	To Collaborate	Partnering
		Problem solving
		Connecting & aligning
		Communicating
		Meeting
	To Prepare	Thinking through
		Creating a guide
		Doing groundwork
Having experience		
Scouting		
Coordinating logistics		
Level 1	Level 2	Level 3

Figure 15. Taxonomy. Taxonomy of uses for the initial planning process of the ISL pilot initiative under development in this intrinsic case study. It contains three levels with all terms involved.

**Spradley summary.** As a part of Spradley’s (1980) complete Developmental Sequence and Taxonomy model, componential analysis and theme analysis is needed. Componential analysis “involves a search for the attributes of terms in each domain” (Spradley, 1980, p. 87). It refers to

“units of meaning that people have assigned to their cultural categories” (Spradley, 1980, p. 131).

This was already done, in a sense, at the very beginning of my analysis, when transferring the transcriptions to message units (Skukauskaite, 2012). I decided to not repeat any similar actions and did not complete componential analysis as suggested by Spradley (1980). I also decided to adapt Spradley’s (1980) theme analysis. For Spradley’s (1980) model, theme analysis is defined as “the relationships among domains and for how they are linked to the cultural scene as a whole” (p. 87 – 88). Thematic analysis was delayed in my study because I also incorporated participant profiles and content analysis.

Since my research was an intrinsic case study that applied Spradley (1980) to transcribed interviews, I decided not to apply all steps exactly as prescribed. I ended the model after determining the taxonomic levels. The constructed taxonomy represents each domain sufficiently. By completing the domain and taxonomic analysis, I gained enough substantial information to continue a joint analysis with the gathered participant profiles.

### **Participant and Interview Summary**

Participant and interview information provided the foundation into an initial planning process of an ISL pilot initiative under development that involved a collaboration between a university and a community in Peru. The participant profiles provided details as to who the interview participants were and their roles in the ISL pilot initiative. The participant perspectives section stipulated what the participants, the interviewees, said during the one-on-one interviews. The interview data analysis as described by my process explored the meaning behind what was said. Spradley (1980) suggests observations for research to be conducted over long periods of time, but this is typically for observations or ethnographic studies. He also states that the research period may last until researchers feel they have thoroughly explored the research question(s) that they began

with. In this case, I felt the research question was meticulously investigated through the nine participant perspectives gained through the interviews. The interview findings listed the themes that came from the interviews. Findings from this study's interviewing process indicate four major themes for the initial planning process of an ISL pilot initiative under development:

- share individual contributions;
- create cooperative group dynamics;
- collaborate; and
- prepare.

In an effort to support information provided orally, written texts were also analyzed.

### **Textual Information Analysis: Content Analysis**

The second component of analysis came from written sources with two different perspectives. The first set of textual data was based on ISL archived records that included bounded documents, electronic spreadsheets, emails, PowerPoints, and pre-reflections. The second textual perspectives came from my personal planning and travel journal. Both types of textual data were analyzed by the same approach, techniques recommended by Huckin (as cited in Bazerman & Prior, 2004). This type of methodology served as an empirical tool to support other methods by considering the meaning of content, such as observable semantic data in texts, and uncovering thematic or rhetorical patterns through conceptual and relational analysis (Huckin, as cited in Bazerman & Prior, 2004). To implement this methodological procedure, I completed the six-stepped procedure. The steps, which may be repeated, depend on what is discovered in subsequent steps.

Table 2 lists the steps and how each one was completed for all text sources. Even though the various text sources were reviewed independently, the analytic procedures were completed holistically.

Table 2

*Content Analysis Steps and General Application*

Step	Application
1. <i>Pose a research question that addresses a topic of interest and one that renders a claim.</i>	The case's overarching research question was the posed question. Since this was an inductive study, a hypothesis was unnecessary. I did not test an educational guess. I wanted to discover what processes emerged when an ISL initiative was being developed.
2. <i>Define the appropriate construct(s) of interest.</i>	My focus was on the process of planning the development of an ISL pilot initiative. I was interested in roles, responsibilities, individual contributions, steps taken, interactions, topics that arose, and the ideas that came about.
3. <i>Select an appropriate text or body of texts as the study corpus.</i>	The study corpus included bounded documents with various pre-documentation and meeting notes, and Excel, PowerPoints, emails, pre-reflections, and my personal journal. These texts related to the research question and represented a part of a larger picture.
4. <i>Determine appropriate units of analysis, or text features that transpire from the study corpus, by categorizing them on a reference list.</i>	Since this was an exploratory study with two types of data sources, oral and written, a brief inductive process noting content and relationship. Prior's (2012) four approaches to the study of documents and records was deliberated in this process. As a framework, I used the interview findings.
5. <i>Gather data through identification of units of analysis, matching to categories, and counting.</i>	This was done by approximating the counts for each of the sources. Meticulous calculations were opted out because the textual information was synthesized and compared with other sources of data.
6. <i>Interpret the findings.</i>	Details of findings are in the subsequent subsections. Overall textual findings and interpretations are followed in the summary. Textual findings were then related to interview findings.

**Bounded documents and spreadsheets.** As the coordinator of the ISL pilot initiative under development, I created two binders with bounded documents. The first binder opened to a one-page document that described the ISL initiative to Peru. It included the purpose, background, description of the service, and the ISL learning objectives. The first section that followed mostly contained documents related to air travel and travel insurance. The second section related to budget and included invoices with estimates and monetary exchanges that took place prior to travel. Following was the overall trip daily itinerary. Next was a listing of the equipment and materials pertaining to the vision campaign. The next section contained information about meetings, including copies of PowerPoint slides, agendas, and other related preparation materials. The binder also had sections related to the country and cultural background information, reflection guides, information about the partnering non-profit organization, contact information, and an ISL guide from another university that was used as a planning resource. The second binder related solely to ISL participants' information, including a couple of participant lists, contact information, and individual profiles and submitted forms. The profiles contained copies of papers, such as copies of participant applications and identification (i.e. passports). All related documents and tabs were based on an Excel planning spreadsheet that was essentially a more comprehensive digital version of the planning binders. The binders contained the most referenced sources of the spreadsheets, such as the list of participants and the forms they submitted.

Nine spreadsheets with detailed information made up the Excel document. The first sheet was a table of all participants, including those from the university civic center staff, U.S. university faculty, U.S. university students, U.S. non-profit organization, and Peru. The second sheet listed all the information from each individual completed on the university student participant applications. The third sheet contained information from each university civic center's intake form. The civic

center staff and the U.S. university faculty and students completed the intakes. A passport list with personal information from university volunteers and staff made up the following sheet. This information was requested by the university travel agent. The next two sheets marked the receipt of university forms from students and faculty, including insurance, a media release form, and other forms regarding liability. Another sheet was a draft of the initial travel and daily itinerary. The following sheet was in reference to budget and costs. This was a live document. It was completed before, during, and after the initiative. The last sheets were a contact sheet, listing individual partners, their roles and responsibilities, and contact information. It also included other essential people, such as the Peruvian van driver, the university accountant, and hotels. Five additional sheets were included in the Excel, but they did not contain information. The sheets were listed as: (1) equipment and material, (2) vision campaign, (3) pre-trip evaluation, (4) trip interviews, and (5) post-trip evaluations. They served more as topics to develop separately.

**Emails.** Emails were analyzed as a source of data pertaining to archives and other reporting documents. Overall, based on the emails and chained responses I saved as the ISL initiative coordinator, there were hundreds archived. All emails between November 2014 to November 2015 were skimmed. Attention focused on email subject titles and the overall main idea of the text of the body. The emails revealed mostly the logistics and coordination of the groundwork to take place in Peru, travel accommodations for those who were performing the service, and team meetings or meetings with individuals.

**PowerPoint presentations.** There were two PowerPoints reviewed. They were the ones from the two meetings facilitated by the university civic center. One meeting took place July 9, 2015 and the other took place November 25, 2015. The main points covered both presentations are listed

in Table 3. Most of the topics shared were informational and logistical in nature. It served mostly as a preparation tool for those taking part in the trip and vision campaign.

Table 3

*PowerPoint Presentations' Main Points*

July 9th, 2015	November 25th, 2015
<ul style="list-style-type: none"> <li>• Timelines: Calendar, Agendas, and Itinerary</li> <li>• People and Responsibilities</li> <li>• Students: Applications and Head Count</li> <li>• Vision Campaign: Goals and Related Information</li> <li>• Budget: Prices, Funding, Transportation, and Accommodations</li> </ul>	<ul style="list-style-type: none"> <li>• About Peru and our partners</li> <li>• Purpose of this service-learning initiative, our roles, and expectations               <ul style="list-style-type: none"> <li>• Safety</li> <li>• Traveling as a group</li> </ul> </li> <li>• Review of traveler information (submission of forms, payments, etc.)</li> <li>• Itinerary</li> <li>• Traveling information               <ul style="list-style-type: none"> <li>• El Niño</li> <li>• Packing tips</li> <li>• Clothes</li> <li>• Money</li> <li>• WiFi</li> <li>• Communication - apps, telephone, etc.</li> <li>• Plugs/electricity</li> <li>• Food and water</li> </ul> </li> <li>• Additional items               <ul style="list-style-type: none"> <li>• Photo share (how to share photos with others)</li> <li>• Contact information - Directory</li> <li>• Reflection</li> </ul> </li> </ul>

**Pre-reflections.** The university center for civic leadership provided a written questionnaire to the volunteers to prompt reflection before their departure to Peru and on their return. Only the pre-reflections were reviewed because of the focus on the initial planning process of the ISL pilot. All pre-reflection responses were to be submitted prior to the trip departure. Seven out of the 13 university civic center group answered the seven pre-reflection questions, though submission was

not mandatory. Below is a table of the questions asked and analyzed summaries of the pre-reflection responses:

Table 4

*Pre-Reflection Questions and Summarized Analyzed Responses*

Question	Analysis
1. Why did you choose to participate in this initiative?	1) part of work, school, research, and professional experience; 2) passion to give and serve; 3) personal development and experience
2. What do you hope to learn by participating in this initiative?	1) to develop future ISL/mission programming; 2) about Peru's culture, healthcare, and needs; 3) to learn about self, professionally and personally
3. Do you have any questions or concerns about participating in this initiative?	Mostly no, but some questions and concerns revolve around building relationships, program evaluation, and for Peruvian community members
4. How do you think you will apply this experience to your educational program and learning?	1) future planning and considerations for program development; 2) personal, professional, and spiritual self-development; 3) community development
5. Do you have any other goals (professional or spiritual) that you would like to achieve by participating in this experience? If so, what are they and why?	1) future planning and considerations for program development; 2) personal, professional, and spiritual self-development; 3) community development
6. What do you know about Peru and its status on vision healthcare?	Little and general knowledge
7. Additional comments.	Positive—grateful, excited, and looking forward to the experience, happy

**My personal planning and travel journal.** A notebook contained my handwritten notes. Journal entries started May 21, 2015, at the beginning of the second scouting trip, and went through December 3, 2015, right before the pilot trip. May 2015 entries contained bullet points of daily events that took place in Peru, including meetings with partners. Budget and money related lists were written, noting expenses, currency exchange, and the conversion of dollars and soles. Names and contacts were also jotted down, along with reflective questions. The next entries were



handwritten notes that provided a template that evolved into the main Excel planning spreadsheet I used to coordinate the December 2015 trip. The entries that followed were random and did not provide any insights into the initial planning process. Starting on October 5, 2015, more diary-like entries appeared and were more reflective in nature. They provided some insight into a timeline of events, personal feelings, notes related to conversations held with different people, and to-do lists relating to preparation tasks. After reviewing the details four themes repeated:

- meetings;
- scouting;
- partners; and
- logistics.

**Textual information summary.** Prior (2012) describes the role of documents in social research as important to empirical study. In the past, the study of documents and records were standardized and emphasized content analysis. Prior (2012) argued that content is important, but a text's function is equally important. Documents and records not only contain information, but also carry out actions. Below are Prior's (2012) four approaches to the study of documents and records:

- the study of document content;
- the archaeology of documentation;
- documents in use; and
- documents as actors.

The first approach, the study of document content, focuses on what is in the document, meaning the information that is contained within this single piece of evidence. The archaeology of documentation, the second approach, is about how a document comes to be. Namely, how it was created. How people utilize a document as a resource to achieve an end is the third approach,

documents in use. The last approach looks at a document's purpose and effect on social interaction and social organization. This research case reviewed emails, PowerPoint presentations, and participant pre-reflections. The study of document content, content analysis, was the methodological approach applied, but Prior's (2012) other approaches were also considered as supplementary substance.

Since content analysis was the focused methodological approach, I applied Huckin's (2004) content analysis techniques as the framework to scrutinize the textual sources of data, including the organizational archives and my personal planning and travel journal. In doing so, I referred to my research question and used the question as my guide. Each construct was identified as a tool during the initial planning process of the ISL pilot initiative under development, having been created for and used before the December 2015 trip. Six different texts served as appropriate texts to study, bounded documents, spreadsheets, emails, PowerPoints, pre-reflections, and my personal journal. The units of analysis, or text features (Hukin, 2004) were pulled together and a general qualitative approach applied to search for repeated topics and inductive reasoning. Prior's (2012) four approaches to the study of documents and records was considered. I did not conduct in-depth counting because the textual data was supplementary to the interviews. Instead, the different texts were viewed altogether. This step of content analysis was modified and applied in general terms. Approximations were made instead. I, then, related the semantic patterns discovered to the domains that produced the taxonomy from the interviews. I modified those terms and listed the four-unit categories as individual contributions, group dynamics, collaboration, and preparation. The emphasis was no longer on the actions, ways, or use. I viewed the documents' subjects. So, I basically switched the verbs to nouns. After narrowly defining the units of analysis, I counted the six textual sources (bounded archives, spreadsheet, emails, PowerPoints, pre-reflections, and journal) and matched

them to the four identified categories (individual contributions, group dynamics, collaboration, and preparation). The count is listed in Table 5.

Table 5

*Content Analysis Count*

Text Features	Count of Sources
Individual Contributions	4
Group Dynamics	4
Collaboration	4
Preparation	5

Indications show that the primarily focus from all documents related to preparation. When looking at the actual context in more depth, the preparation related mostly to setting up meetings, the content of the meetings, and travel logistics for the two scouting trips and the actual ISL initiative.

### **Thematic Analysis and Findings**

This intrinsic case study made visible a timeline of the initial planning process of the ISL pilot initiative between a south-central Texas private university and a ministry of Catholic Sisters in Chimbote, Peru that developed between 2013 and 2015 (see Appendix I). The timeline indicates occurrences that happened during this period, but it also ties in data found through the interviews, the actions, or ways, that were used during the developmental stage of the pilot. The timeline also supports and aligns with findings provided by the archived records and my personal planning and travel journal. The patterned findings build upon one another and overlap over a course of time.

The timeline sequence shows how the group dynamics were first formed through individual relationships and individual people who had a vision. As they got together, brainstormed, and shared their individual contributions of what they could do. They also expressed their desires. The insights were brought forth through the collaboration. Every single person made the group. The meetings, in

all forms, gelled the group. The group interaction and cooperation were needed for the planning and the preparation. During the early stages of planning process, great value was given to scouting.

During latter stages of the planning process, more emphasis was placed on preparation and logistics.

By combining all information gathered and interpreted, I discovered predominant premises that created preliminary themes. When corroborating all perspectives gained from the interviews, the organizational archived texts, and my own, more details were uncovered. Some of the preliminary themes contained sub-themes. Thus, findings from this study indicated four major themes and three sub-themes for the initial planning process of an ISL pilot initiative under development:

- 1) Individual Contributions
- 2) Group Dynamics
- 3) Collaboration
  - a) Meetings
- 4) Preparation
  - a) Logistics
  - b) Scouting

Themes are listed in a certain order because each theme built upon the prior ones. First, every individual had a unique set of gifts, expertise, knowledge, skills, and experience. Individuals made up the foundation for ISL. If a person had not been present, service would not have been implemented. Individuals enabled the service. As individuals expressed personal needs, desires, and interest with others, a spark ignited. Through the exchanged interaction, partners provided feedback. Upon the feedback, roles and responsibilities developed, either due to position, assignment, or volunteerism, or organically. The individuals involved provided people power and helped in the various components of the ISL initiative.

As individuals were identified, committed, and invested time, a group of like-minded people formed. The gathering was due to similar interests, visions, and missions. Each member of the group shared unique, individual contributions when collaborating, working cooperatively. The group as a whole, and individuals who carried out certain roles and responsibilities, prepared before implementing the ISL pilot initiative. Major sub-themes found related to collaboration are meetings, and to preparation, are logistics and scouting. The ISL pilot initiative initial development took place during the planning process, which continues throughout the entire ISL process.

### **Summary**

Findings revealed four common themes contributing to the initial planning process of an ISL pilot initiative under development: individual contributions, group dynamics, collaboration, and preparation. Meeting was a subtheme that emerged under collaboration. Logistics and scouting were two subthemes that surfaced under preparation. Findings were not generalizable due to the essence of qualitative research, but nonetheless, they offered a re-presentation of perceptions and understanding generated from the participants and researchers under this particular context (Lichtman, 2013). A qualitative study “can provide only suggestive answers to any question framed in general terms” (Maxwell, 2013, p. 79). These findings stipulated insights into the dynamics, process, and learning that occurred in and through one ISL pilot case under development.

## Discussion, Conclusions, Recommendations, and Summary

“It was almost like a web...” — Interviewee 4

The inquiry for this study explored the initial planning process of an ISL pilot initiative under development that involved a collaboration among a south-central Texas private university and a ministry of Catholic sisters in the area of Chimbote, Peru. A non-profit organization, as well as a Peruvian optometry school, joined in on the efforts. The religious order of sisters that founded the Peruvian ministry also instituted two of the other collaborators, the university and the non-profit organization. Thus, three out of the four major collaborating establishments connect with the sisters' mission and charism.

ISL participants, leaders, coordinators, contributors, developers, and partners from the four entities revealed nine different perspectives in the semi-structured interviews. Seven U.S. and two Peruvian organizational leaders, administrators, coordinators, and university members made up the interviewee pool. Interviewees shared thoughts on their roles and responsibilities; the case's planning process and its positive attributes; collaboration with others; and other ISL planning considerations and recommendations. The interview transcripts were analyzed via Spradley's (1980) Developmental Sequence and Taxonomy. Supplemental data, including textual information from organizational archives and my personal planning and travel journal, provided additional insights. All textual information was analyzed with content analysis techniques recommended by Huckin (2004). The oral and written data sources were cross-referenced to investigate themes, relationships, and descriptions to make sense of all of the data in its totality (Becker et al., 2012; Marshall & Rossman, 2011). I followed appropriate research protocol (see Appendices A through F), recognized the study's limitations, and implemented applications of trustworthiness for research credibility. My inquiry found that the initial planning process in its first stages for this ISL initiative undergoing

development involved individual contributions, group dynamics, collaboration, and preparation. Meetings, logistics, and scouting were also important themes.

In the following discussion, I synthesize the presented findings based on the analysis detailed in chapter four. While I interpret the synthesis, I relate the findings to the existing body of knowledge. Then, I highlight my case's contributions and recommend ways to expand my original inquiry. The presentation of my work promotes the understanding of ISL development and structure during its infancy stage by making visible the planning process and its constructs. By capturing the process (Kiely, 2005), a practice-based research contribution (McBride & Mlyn, 2012) is made to shape the planning and practice of ISL (Bringle & Hatcher, 2011; Kiely & Hartman, 2011; Plater et al, 2009) in a constructed holistic manner (Crabtree, 2008; Erasmus, 2011; McBride & Mlyn, 2012; Tonkin, 2011). It is based in theory and is pragmatic. The initial planning process is more than a phase or a component of ISL. It is the backbone that structures the pedagogical practice from beginning to end.

### **Discussion of Findings: Begin with the End in Mind**

As I conducted my research for this study, I listened to an audio book, Stephen R. Covey's (1989) *The 7 Habits of Highly Effective People*. It helped me connect the first dots to synthesize my research. Covey argues that principles are long-term "fundamental truths that have universal application" (p. 43). Principles withstand the test of time while surpassing fads that come and go because they are "natural laws that cannot be broken" (p. 41). The seven habits identified by Covey are "principle-centered" (p. 50) paradigms, or "maps" (p. 31), that enable practical, effective practices. One of Covey's habits of highly effective people is to begin with the end in mind, Habit 2. In very broad terms, beginning with the end in mind means looking into the future and visualizing an ultimate goal. The idea is to use that image as the "frame of reference or the criterion by which

everything else is examined” (p. 105) so that there is a clear understanding of the final destination or product. It is the guide for all actions and decisions.

This case parallels Covey’s principle-centered paradigm. Various people from different entities engaged in the initiative for a variety of reasons. Interactions led to the construction of webbed relationships. These relationships brewed ideas and mutual interests in working in partnership. The partners envisioned a cooperative to meet mutual objectives. Now, with a common goal, a map of events and interactions led to the final product, a pilot initiative focused on a collaboration involving university students to provide eyecare to Peruvians through a vision campaign. An ISL experience was one facet of the entire pilot. Yet, truly, the project originated as a means to determine the possibility of future, sustainable endeavors. The pilot was the end in mind.

Those implicated in the initiative rallied to the pilot to create a trial to guide future decisions and to give shape to bigger visions. Each was called in some fashion to the initiative, and everyone wanted to serve and be a part of it. Even so, no evidence indicated use of the specific term *international service-learning* during the period of development. Other language popped up in discussions and documents, such as *mission trip*, used by the university faculty, or *immersion trip*, used by the non-profit organization. Additionally, participants did not directly use the specific phrase *adult learner*. Rather, the rudimentary term *student* was widely used. Each of these words and phrases provided different slants to the pilot, and perhaps directed a certain image relevant to a specific person’s role and affiliated organization. Thus, the initiative carried multiple frames of reference and criteria for evaluation, leaving ISL as an incongruent ambiguity. Research for this study indicates that the preliminary phase of planning for ISL was submitted to multiple considerations, such as different intentions and uncertainty. During this time, there were characteristics of ISL targeting adult learners, but clarity came with small strides, making discoveries throughout each advancement.



Specific planning for ISL design and program were present, but undeveloped or even lacking, because the focus was on discovery and gaining more knowledge. Understanding design and programming progressed as each step guided the next action and decision.

The initiative's design presented as innovative for the group because the diverse, cooperative nature was new to the participants and pioneering for the organizations involved. Certainly, the initiative contained practices of internationalization, study abroad, and service. It also carried full ISL characteristics. The pilot's scope, and the potential of it, made it original. Planning towards creating, or even considering the possibility of creating, specific ISL programming took place over time, cycling through many beginnings and endpoints. To reach the overarching aspiration of employing impactful practices that ready tertiary school-level learners for a modern, global world, planning with the end in mind flows into the other phases and components of ISL that renders positive influences on students and the community in a holistic manner.

**Timeline and thematic features.** The findings of this dissertation made visible a timeline of the developmental stage of an ISL pilot initiative, as seen in Appendix I. Different interviewees and written documents provided information concerning events that occurred between 2013 and 2015 to construct a sequenced series. Having the year 2013 as the starting point is significant because it marks the beginning of documented meetings specifically related to the initial planning process.

The timeline not only lists occurrences of all that happened, but it weaves in the discovered themes of individual contributions, group dynamics, collaboration and preparation, and the stages in which they were significant. The four themes, and their subcomponents, including meetings, logistics and scouting, built from one another in a co-constructed, conjoint manner. The themes and subthemes are not assembled like singular modules, but are mixed like a solution. Collectively, no

single theme ever had a definite start or endpoint. Overall, through the analysis and findings of the study, one theme was not more important or of more value than another. Rather, the data indicated that at specific points in time, in the interviews and in the written information collected, themes emerged as a prominent feature that led to patterns. Through identified patterns, the timeline in this study and its features model the initial planning process of an ISL pilot initiative under development that involves a collaboration between a south-central Texas private university and a ministry of Catholic sister in Chimbote, Peru.

***Before 2013: Foundation set for individual contributions.*** Prior to 2013, two founding ingredients were in place that would eventually play significant roles throughout the initial planning process of the 2015 Peru initiative. One of the main ingredients was association powered by individual relationships. The primary catalyst for building the network for the relationship was established by the Catholic sisters. They were the ones who established the relationships in Texas and in Peru. Although the relationship with the Peruvian school happened after 2013, the rapport started because the university met the administrator of the Peruvian school at a conference in 2014. As professionals, it is assumed that they were building working relationships too.

The second ingredient was individual initiatives already active and in place. The clinic in Peru had already been operating over fifty years by the time the ISL initiative took place. The non-profit organization had made other service-oriented trips to Peru, not only working with the clinic, but with the other Peruvian ministries as well. The university, too, had many variations of ISL, but perhaps with different emphasis and through different departments. Perhaps these initiatives already actively in place were not ISL as was implemented in the case or as defined by Bringle and Hatcher (2011), but the experience of these initiatives intersected with many ISL characteristics and concepts. Thus, prior to 2013, the participants had experience and knowledge with similar ISL-like initiatives.

In the very precepts of the initial planning process, various relationships that had been established and individual active initiatives laid the foundation for individual contributions. Prior to the ISL ideas developed in 2013, these accessible assets already existed. Post 2013, the two ingredients were leveraged. As individuals networked, their already established connection was strengthened by their common, overlapping missions. The missions drove personal motivation, wants, and desires. Relationship and motivation are similarly ingrained in other planning philosophies, such as empowerment planning (Bengle, 2015) and Asset Based Community Development (ABCD; Kretzmann & McKnight, 1993). Ultimately, these two ingredients of relationship and motivation set the foundation for the ISL initiative that later took place in December 2015.

*2013: Ideas come together through group dynamics.* In 2013, recognizing the foundation, there was one main individual who started to connect the dots in the initial planning process. This individual invited other individuals to meet one another. As individuals came together, they shared information about their areas of expertise, knowledge, skills, and experiences. The participation in the gatherings generated people power. The presence of several individuals interacting and sharing feedback with one another formed into a group. The group of individuals also expressed personal needs and desires. As interactions continued, individuals started to get to know one another. Connections were made, and ideas started to align. Gradually, contributions in certain areas developed, and with them, the roles and responsibilities among the group formed for the initial planning process.

The significance of this time is that individual contributions turned into ideas. The co-construction of the ideas subsequently created a cooperative group. The group dynamics emerged as the group built and maintained rapport. As time continued and the group became more cohesive, a

collective understanding developed, and expectations grew. Although their purpose was not yet well-defined, at this point of the initial planning process the end goal was to consider how to further collaborate with the individuals in the group.

*2014: Collaboration clarifies vision.* By 2014, the initial planning process emphasized deeper discussions regarding the group's potential mission among the leadership of the U.S. based organizations, and initial partnerships were formed. In July, a more formal partnership between the university's civic center office and the non-profit was established, with the intention of developing a service-learning project. During the fall, a university dean met a Peruvian school administrator, who would later become an ISL partner. Also, during the fall, the non-profit organization and the university civic office assigned coordinators to oversee the work to be completed in Peru; again, with the focus on coordinating with the opposite organization. Between October and November 2014, it was decided that members from the university would travel with the non-profit organization to Peru in December of that year. As part of the non-profit's tradition, a commission ceremony of all global travelers took place before this first scouting trip. During the commissioning ceremony the history of the sisters was shared, as well as the purpose for the trip. Attendees of the trip had the opportunity to learn more about the meaning of their journey.

In December 2014, a significant step was taken in the planning process. The non-profit, as a liaison, arranged for the university to plug into their Peruvian network to meet potential project collaborators. The 2014 scouting trip gave university members the opportunity to travel to explore and become familiar with the Peruvian context, people, and environment. The scouting trip allowed for sensing, exploring, and the opportunity to learn from firsthand concrete experience. By the end of 2014, the vision of an ISL pilot initiative was clear at this point of the initial planning process.

The actual end ISL product was still not totally clear, but what was clear was the goal to assist and serve healthcare needs in Peru. During this stage, the group cooperated to problem solve and to figure out the next steps. However, communication continued, in different ways, including face-to-face meetings and technology use. The group continued to connect and align the dots together.

***2015: Preparing for implementation.*** Before setting the ISL mission, more preparation was done in the initial planning process. In 2015, communication between all partners, U.S. and Peruvian, was more continuous. After the 2014 scouting trip, reflections of what was learned and what could be applied to the vision were ongoing. It was decided that a second scouting trip would reaffirm the relationship between the university and the Peruvian clinic partners and gain a better sense of what their goals were for the initiative. While preparation for the second scouting trip took place in the spring, in March the Peruvian school partner came to visit the university to get a better sense of potential collaboration. By the end of his visit, a formal partnership between the schools was signed. In May, another major planning process step took place. I, as coordinator for the university's civic center, returned to Peru with the non-profit organization and followed up with the two confirmed Peruvian partners, the clinic and the school. Upon return, I, along with other planning partners, focused on ISL logistics, formalizing travelers, applications, finances, and travel arrangements. In the summer, university travel participants confirmed their intent to participate. Coordinators briefly informed travelers of the initiative's purpose and the general context of the situation. In July, a dean from the university went to visit the optometry school in Peru. Upon the dean's return, he shared additional information with one of the university professors who was the vision campaign coordinator for the December 2015 trip. During the the initial planning process in the fall of 2015, all travel and vision campaign logistics were developed and finalized. In November,

the traditional non-profit commissioning ceremony took place. Also, the whole group of ISL participants participated in face-to-face meetings with each other in Texas and via technology with Peruvian partners. In December 2015, the planning process terminated, and the pilot initiative was implemented. The next phase of ISL began.

During this phase of the initial planning process, planners were thinking through and processing their thoughts, reflecting on the information and experiences gathered, and being intentional. The vision and goals were set. Steps toward the initiative were moving forward. Like a puzzle, pieces and people were being fit together to form agreements and make sure all parts were moving in the same direction. There was a state of not only being intentional, but a consciousness about decisions and potential effects of those decisions. There was both awareness and focus.

By this time of the initial planning process, some structures were in place, like the non-profit's travel guide. Also, different forms and applications containing logistical and legal information were created. Institutional protocol and procedure had to be learned and followed. The rules and procedures were being formed as each month passed and the ISL pilot neared. The focus was mostly on coordinating the logistics for travel and the vision campaign. There were many volunteers and workers from the various partnering organizations doing the groundwork. All the details were being organized. Collaboration continued with information exchanges and sharing. Much time and commitment were designated to the project.

**The initial planning process.** The timeline sequenced what happened before the 2015 Peru initiative's implementation. The planning group's roles, responsibilities, decisions, procedures, and planning attributes transpired within the outlined timeline. As it developed, it demonstrated the uses of the themes of individual contributions, group dynamics, collaboration, and preparation, and

the sub-themes of meetings, logistics, and scouting. These findings, the timeline and its uses of all themes, exposed the initiative's initial planning process studied in this case.

Aligning the case and its findings to Pechak and Thompson's (2009) Conceptual Model of Optimal International Service-Learning's contextualized an ISL framework that emphasized the initial planning process while accentuating the field towards adult education and learners. The alignment maintained the original conceptual characteristics while adapting the model to showcase the planning process and its role throughout the different phases of ISL. Pechak and Thompson's (2009) work was updated by Pechak and Black's (2014) work before this study's alignment. Pechak and Black suggest that modifications to the model may provide a useful framework for future international clinical education program development and research. It opened opportunities for further model enhancements and advancements in related fields.

The original ISL model (Pechak & Thompson, 2009) and the updated model (Pechak & Black, 2014) are both constructed in terms of phases, consequences, components, and conditions. These parts echo descriptions of features I discovered in my study. Other similar associations relate in terms of development, relationships, partners, reflection, preparation, expectations, understanding, roles, and mission. A specific example of similarities found between my study and Pechak's and Thompson's (2009) conceptual framework is related to an essential component of the development phase of ISL. It is having a community-identified need as a possible targeted ISL mission. My study found that the initial planning process featured the use of creating cooperative group dynamics, which included interaction with the community. Through the interaction, the needs of the Peruvian community arose. For everyone involved, learning and following expectations, and understanding mission, led to the targeted mission for the 2015 initiative. Despite the similarities, the timeline, features, and process of planning are slightly different than Pechak and Thompson's (2009)

Conceptual Model of Optimal International Service-Learning. The conceptual model parts presented by Pechak and Tompson (2009) are more like Nelson's (2015) program elements.

Nelson (2015) reports significant foundational elements in previous ISL studies coming from various researchers, such as Cipolle (2010), Crabtree (2008), Eyler and Giles (1999), and Kiely (2005). Examples of such elements are new or disruptive international border crossing experiences, critical reflection, and reciprocal connections. Nelson, too, finds foundational elements in ISL, and lists six elements that are considerations when developing a service-learning program or course. Nelson's program elements are: (1) reflection activities; (2) crossing international borders; (3) reciprocal connections; (4) group dynamics; (5) non-service activities; and (6) services related to area of study.

Reported ISL elements and my findings regarding the initial planning process for an ISL initiative are similar in some ways. Although not worded in the same way, the general concepts of group dynamics, reflection, and building and maintaining rapport are ideas overlapping with those of Nelson (2015). Conversely, my study findings differ from Nelson's elements in the sense that my emerged themes are not elements. They are not aspects of ISL programming or factors that make students participate in an ISL program (Nelson, 2015). The difference is that my study's focus is on the planning process and captures the actions taken during the initial phase of an ISL pilot initiative under development. The purpose was to gain an understanding of how ISL is created and how it progresses to program design, and more specifically, program design for adult education and learning. The themes found in my study were *used for* the initial planning process of an ISL pilot initiative under development. The themes, or usages, blend into the culture, or the context and circumstances, of the ISL planning process. My findings are tools that can be used for the implementation of ISL elements and program development for adult learners in higher education at



the foot of globalization. Individual contributions, group dynamics, collaboration, and preparation, as well as meetings, logistics, and scouting, contribute to the featured dynamics that formed the initial planning process. These featured dynamics are fluid and move ISL parts and elements.

**Planning holistically.** The sequence and the featured dynamics of the initial planning process of this case add movement to the Essential Core Conditions of the Development phase of Pechak and Thompson's (2009) Conceptual Model of Optimal International Service-Learning. The sequence and the featured dynamics of the initial planning process of this case also flow through ISL elements. The planning process is not sequential, but rather runs throughout the entire ISL experience, including all its parts and elements. The process is webbed, and the dynamics are interrelated from beginning to end. The initial planning process of an ISL pilot initiative that targets adult learners in higher education is live and malleable. Planning holistically is a more comprehensive approach that can incorporate all of the intricacies that are webbed into an initial planning process that is under development.

***Introducing the conceptualization of a holistic planning approach for ISL in higher education and adult learning.*** Essential to planning holistically is keeping the macro goal, or the end, in mind. For tertiary education, planning holistically means targeting relevant higher educational programming and its intention to graduate students prepared for the demands of the bigger world, including stewardship to community. ISL is a pedagogy that can be used for adult education. Going along the continuum of the ISL's research historical progression, current ISL literature (Amerson, 2014; Bengle, 2015; Johnson et al, 2017) promotes the inclusion of community and other partners. Each entity is equal in value and provides reciprocity. Again, keeping the end in mind, ISL's holistic planning emphasis is not only student-learning-centered, but community-and-partner-centered, as well. This directly follows McBride and Mlyn (2012) suggestion to start with the end in mind as

“win-win” (Begin with the End in Mind, para. 1) goals for all concerned parties, including the host site, served community, students, and institutions.

My research indicates four major and three minor dynamic features presented when planning an ISL pilot initiative for adult learners. Findings from this study yield individual contributions, group dynamics, collaboration, and preparation, accompanied by meeting, scouting, and logistics. These dynamic features of the initial planning process should then be considered for a holistic planning approach. These features should not be separate parts or elements, but must be ingrained in a fluid fashion as a characteristic of the planning culture.

Secondary to the shift in planning culture is the role and practice of reflection. Reflection is associated with McBride and Mlyn’s (2012) second suggestion to work through the progressions (Emphasize and "Process" the Process, para. 1), meaning contemplating the procedures involved, the implications in building rapport across all stakeholders, and developing long-term partnerships. Based on the participants in this studied scenario, and the participants who represent the scenario at a later in time from their actual experience, did not set reflection as a major factor. It was included, but not emphasized. Many interviewees mentioned reflection, and it appeared in texts. The role of reflection was minimal in comparison to the recommended ways of how critical thinking and reflective contemplation should be incorporated in ISL. A large contextual factor to consider in this one particular case is the fact that the initiative was a pilot initiative under development. It was exploratory in nature. As mentioned earlier, the role of service-learning was examined as a single piece of a larger picture. Perhaps it will be a lesson learned to have reflection more predominant for the planning process itself in order to have a more effective service-learning program and experience, as well as to further differentiate such a learning experience from other study abroad or

travel experiences that incorporate volunteerism. Reflection is key to trigger not only change in a student, but transformation and transformational learning.

As stated before by Bringle (2009) and Caffarella and Daffron (2013), change is not easy, especially for program planners and higher education because of the difficulty, complexity, uncertainty, and resistance. Although there are different ways to change, as describe by Mezirow (1997) and Poutiatine (2009), the shift is about elaborating existing frames of reference to learn new ones and altering viewpoints and habits of mind relating to ISL planning processes. There must be a break in the protective belt (Malinen, 2000) to not only allow change, but transformation. Transformation, even in the planning process, includes the human experience and a holistic approach, critical reflection, and movement through time (Poutiatine, 2009). Reflection, as part of the planning process, guides the entire ISL process.

Introducing the conceptualization of a holistic planning approach for ISL in higher education and adult learning with a planning culture shift, reflection, and transformation does many things. Mainly, it supports the movement towards global service-learning. By supporting global service-learning (GSL), many ISL criticisms are addressed. This includes accepting the challenging responsibility to act ethically and to avoid harm and negative, unintended consequences (Crabtree, 2013; Hartman & Kiely 2014a; McBride & Mlyn's, 2012). Having this end in mind heeds McBride and Mlyn's (2012) assertion to have practice coincide with research to improve ISL knowledge and its implications and Crabtree's (2008) promotion of project and program level research. Academics, policy-makers, and practitioners can use the idea of planning holistically as a research-based and methodological approach with clarity, avoiding opaque views (Boyask, 2012).

## Conclusions and Implications

As cited before, Crabtree (2013) stated that there is still a need to understand the essential, multiplex contexts that “should inform program development at our institutions, operational choices of partners and sites, management of the dynamics of an ISL project as it unfolds, and the study of outcomes” (p. 52). This acknowledgement of the lack of understanding of ISL development and structure is further supported by Kiely and Hartman (2011). Such researchers push for direct empirical work in the field of ISL. With emphasis on ISL implementation (Tonkin, 2011; Jones & Steinberg, 2011; Kiely & Hartman, 2011), my work contributes to the understanding of ISL development and structure that is lacking (Crabtree, 2013; Jones & Steinberg, 2011). It also makes visible the planning process for shedding light on planning assumptions for programs for adult learners, as referred to by Caffarella and Daffron, (2013). Often assumed is that a higher education program automatically equals student learning.

Exposure to a subject matter may influence thinking, but may not be what is intended to be taught. Kuh’s (2008) “purposeful pathways” (p. 8) align with Dewey’s theories on education. A proper education is to be planned with direction. Beginning with the end in mind, advocated by Covey (1989) as a habit of highly effective people, can guide the teaching and learning streamed through a program. The way a program or course is set up influences the overall message communicated to students. Hartman and Kiely (2014a) advocate transitioning ISL to global service-learning (GSL) to steer in a more positive direction and to observe ISL strengths. The future of ISL is to be inclusive and diversified. My study highlighted ISL’s history in Figure 4 and provided avenues in which it is and could potentially head.

Although the ISL field gained a strong foundation and is maturing, criticisms exist. There still lingers unknown factors and gaps, especially when looking at ISL in terms of an instrument for

adult programming in higher education. One way that my study advances the ISL field is by shaping the planning and practice of ISL (Bringle & Hatcher, 2011; Hartman & Kiely, 2011; Plater et al, 2009). I provided a timeline of events that brought forth certain dynamic features that comprised the process. It answered the where and when-to-do-what in a pragmatic sense. It captured the “process” (Kiely, 2005). It was constructed holistically (Crabtree, 2008; Erasmus, 2011; McBride & Mlyn, 2012; Tonkin, 2011). The results are real because it is a practice-based research contribution (McBride & Mlyn, 2012).

The most current ISL literature points to planning holistically. As Nelson (2015) states:

ISL programs present a unique opportunity for participants to live and work alongside one another. This aspect on an ISL program provides an environment in which to explore diversity issues within the group... This is an area of future study that is open and worthy of exploring. (p. 174)

My intrinsic case study provided a well-rounded account of the process of ISL under development by having a diverse group of interviewees and data sources. It added depth to the understanding of the planning process with the different perspectives provided. There was a cross-section of interviewees. Most were participants in leadership positions who were in charge of major decisions and coordination positions that took charge of the practical matters. Yet, there was a voice that may not be immediately connected with planning, a student, and my voice, that of a practitioner-researcher. The study of documents and my personal journal enriched the cross-section and approach in learning about ISL and programming for adult learners. The insights, in their totality, provide multiple points-of-view.

Further, my methodology, including the overall approach and the analysis, helps to fill in “the paucity of high-quality qualitative research and empirical research” claimed by Kiely and Hartman (2011). As seen in Figure 8, all boundaries that encased the study were shown, with pictures from the “mini-cases” (Stake, 2005, p. 451) through the participant profiles to the

“functioning body” (Stake, 2005, p. 444) of all the perspectives, which derive orally and textually. As a “bound system” (Stake, 2005, p. 444), the intrinsic case study revealed the timeline, its features, and an introduction to holistic planning. Moreover, adapting Spradley (1980) provided transparent, empirical research. It laid out every step of analysis and provided the leads to the content analysis. Spradley strongly shaped and influenced my work.

My study narrows the gap in the research by providing perspectives of participants who experienced the ISL planning process. The study asked participants to share their viewpoints, supplemented with written documents to support those views. The insights developed from the analysis of sources provide a framework that may prove useful to guide the future planning process of ISL designs for other institutions of higher education who desire to implement high-impact learning practices. The study is guided by relevant qualitative research design and methodology, along with a conceptual framework and a theoretical perspective. Theory is an important aspect of practice. It offers the lens from which to view and interpret. In this case, the theoretical perspective was from Dewey’s historical theoretical works related to service-learning theory and his early 20th century philosophies of democratic and experiential education.

When viewing the ISL initial planning process through a Deweyan lens, as my research does, the notion of planning holistically is clear. A planning community is created through a human experience made up of social bonds. The contacts, interactions, and presence among those involved in pre-trip planning for this ISL initiative under development allowed understanding and preparation from different angles. The planning community shared engagements synced in the same environment, regardless of being physical or virtual, and time, working together on mutual activities to reach a common goal that was democratically agreed upon, despite different intentions and needs. A process of transmission, to which Dewey refers, of doing, thinking, and feeling led to a common

understanding. To capture the learning experience of planners for adult learners through service-learning pedagogy, the planning experience was personal for all involved, reciprocal, authentic, intimate, and meaningful. An ISL planning community was formed as a consequence of the learning experience, especially since this was an ISL pilot program that was under development.

With the timeline construction and thematic analysis, the initial planning process of an ISL pilot initiative during its development and each of the dynamic features involved are visible. My inquiry contributes in many ways to the body of knowledge in the field of ISL in combination with planning programming for adult learners. Those most interested may be stakeholders of service-learning practices and higher education for adult learners. My study adds to the body of knowledge for scholars and practitioners. Those studying related fields may take interest in the methodology and the historical information presented. A scholar may also appreciate the theoretical perspectives and frameworks. For a practitioner, the tie with programming for adult learners may be interesting and the planning timeline with its features may be useful to adopt and apply. Both researchers and practitioners may show interest in the introduction of planning holistically. Since I was a practitioner-researcher in this case study, lines blurred among the two roles (Cochran-Smith & Lytle, 2004). I became an insider through practice (Allwright, 2005; Bishop, 2005; *Insider/Outsider Perspective*, 2007; Jain, 2013).

As a practitioner, implementing investigative practices is a complex relationship of practice and scholarship that nurture one another to generate and contribute knowledge to guide actions while making that knowledge applicable to other public contexts and to their appropriate field (Cochran-Smith, 2005; Jain, 2013). There is a “reciprocal, recursive, and symbiotic relationship” (Cochran-Smith, 2005, p. 219). My insider social knowledge came from a personal viewpoint, subjective interpretation, which differentiates from an outsider’s perspective whose knowledge of

the social world is explained through the causes of human behavior (Insider/Outsider Perspective, 2007).

As a researcher, I was the primary instrument in the empirical research process to be able to understand the problem, issues, procedures, and, ultimately, construct a reality (Kiely & Hartman, 2011; Lichtman, 2013) As the primary instrument, I was responsible for following the empirical process and making decisions of moving to and fro among data gathering, analysis, interpretation, and representation while reviewing settings, making sense of the information, and constructing a reality (Kiely & Hartman, 2011; Lichtman, 2013). Descriptions, understandings, and interpretations came from the information I gathered and my aptitude in organizing and integrating them to make a meaningful whole (Lichtman, 2013). All was filtered through me and influenced by my experience knowledge, skills, and background (Lichtman, 2013).

Caution of balancing the roles of practitioner and researcher must be given to mitigate potential bias. Safeguards and practices of trustworthiness protect the integrity of a practitioner-researcher. Most importantly, it is vital that the practitioner-researcher is transparent, exposing and justifying thinking processes and how findings are made. The idea of practicing scholars is prevalent in certain types of qualitative approaches, such as action research. When incorporating appropriate research protocol and standards, involving a practitioner-researcher presents many benefits.

The role of practitioner-researcher offers richness to the initial planning process of ISL initiatives targeting adult learners in higher education. This dual role offers a social knowledge that comes from a unique contribution derived from personal viewpoints and subjective interpretation (Allwright, 2005; Bishop, 2005; Insider/Outsider Perspective, 2007; Jain, 2013). Further, practitioner-researchers provide insight with an externalist perspective that is inclined to rationalize a phenomenon while offering an internal perspective through practice to understand (Allwright, 2005;



Bishop, 2005; Insider/Outsider Perspective, 2007; Jain, 2013). The role is holistic to the planning process. While in this position, starting a new ISL initiative is likely to be set on a strong foundation.

Often, initiatives begin with the end in mind, but do not know where to start if the initiative is new and has never been done before. As it develops, the steps become clearer, as individuals make personal contributions and form a collaborative group in order to prepare holistically for ISL. Based on the entire work presented, the initial planning process of an ISL pilot initiative under development is a series of occurrences that happen over time. During this period, dynamic features, including individual contributions, group dynamics, collaboration, and preparation that integrate with each other emerge and flow through the entire ISL project. Ultimately, the initial planning process for ISL, a pedagogy in higher education, influences programming for adult learners.

### **Recommendations for Future Research**

In order to progress along the continuum to provide purposeful, meaningful educational experiences, more questions need answers. As a catalyst for future research, I recommend that research continue on ISL, in general terms, but also look more in depth at the planning process of ISL initiatives geared towards adult learning. One of the first recommendations is to extend interviews to other types of planners and decision makers. Most of the voices heard in this study were in leadership. Incorporating those who completed the ground-level and daily tasks would broaden the insights with more detailed information and other perspectives. This research may include people who deal with financial, travel, transport, and legal aspects. More specific to this study would be to include the missionaries, workers from the clinic, the other volunteers from Peru, and those from the religious order of sisters whose congregation sponsors all three ministries involved: the university, the non-profit, and the clinic in Peru. For other cases similar to this one, the idea is to interview those involved with specific aspects of planning.

A second recommendation is to scrutinize other data sources. For example, in this research, most of the written texts analyzed were created by me, the practitioner, the coordinator for the university office spearheading the initiative. However, others, such as the administrators, directors, and coordinators of the organizations, also kept journals and other written planning documents. These types of textual sources would provide additional insights. Another type of data source that could be reviewed is recorded meetings. Transcriptions of what is said in the meeting could be captured, as well as observations. This would be a way to gather data as it is created live. Observations could compare participant words to actions. Recording meetings also leads to the third recommendation.

It is recommended to conduct investigations during the actual planning phase. This could take form in action research or even as part of a phenomenological study. Action research is a community-involved practice that would provide information on the unknown how-to problem for entities wanting to implement ISL. Action research could also improve practice if ISL is already implemented. A phenomenological study would give more awareness into the lived experience. Although my study provided a window into the initial planning process for ISL, it was more reflective and captured what had happened rather than what was happening as it occurred.

My study captured and revealed many moving parts, as described by the interviewees and demonstrated in the textual information. As such, any single aspect could be further investigated. For example, more research could delve into one of the dynamic features, such as the scouting aspect; one of the roles, such as that of the students; or other components that were not even exposed within the boundaries of this case, such as the financial pieces. Capturing and revealing the many moving parts and all of these related inquiries could provide a broader picture of planning and

possibly contribute to the expansion of the conceptualization of planning holistically. Furthermore, the effects of these other ISL planning components have merit for continued research.

Another recommendation is to further investigate the context of this case or another case that also involves a faith-based context. As mentioned before, three out of the four main collaborating entities were instituted by a religious organization, which all value service and Catholic social teachings. It would be interesting to explore if having a mission prioritizing service-learning could have any influences on the initial planning process. Kollman and Morgan (2014) write about international service-learning in faith-based contexts. One of the conclusions from the authors states that “inviting students to utilize their own religious and spiritual narratives as they make sense of their service-learning experience provides a more holistic education for our students” (p. 205). A religious angle provides another way to connect experience and learning.

Future research can also extend methodological practices used in this study. For example, I adapted Spradley (1980) to interviews. However, an ethnographic study that includes observations is recommended. Additionally, the study could be extended by researching the effects of the planning involved. Like Nelson (2015), my timeline and its domains can be compared to other ISL cases to see if the same or different information emerges. From that, quantitative studies may emerge. A potential quantitative study that could enriches ISL is an investigation into the effects of the links between the beginning ISL processes to other phases of ISL. Quantitative studies add the ability to investigate effects. More so, this alternative methodology adds large-scale generalizable findings, a measurable way to address similarities and differences in ISL initial planning approaches.

## **Summary**

My work addressed the gap in the research of the experiences of participants involved within the case study. The study asked participants to share their perspectives. Archives and written

documents added another perspective. My personal journal allowed me to offer an alternative perspective as a full practitioner in the process. The insights developed from the analysis add to the body of knowledge and are available to guide future planning processes of ISL designs for initiatives of institutions of higher education geared towards adult learners and for those who desire to implement high-impact learning practices. The study was structured through relevant qualitative research design and methodology, along with multiple conceptual theories and frameworks.

Internationalization, service, and learning are basic components that create ISL. Much interest lies in each of those components individually and in the sum of all of them. The planning involved may seem less attractive. In my review of previous research, planning seemed to be overlooked in the field of ISL. At least, ISL planning was not the first area to be explored. When thinking of ISL planning, in general, it may seem quite simple and maybe even obligatory. Many assumptions are made, and the actual tasks can be mundane. However, there are multiple dimensions, much like a spider web hanging between twigs among tree branches. The intricately engineered web could easily be overlooked by a casual observer, yet, for the spider, it definitely serves an essential purpose. My research brings about the web-like complexity that is present within the infancy stages of an international service-learning project. It discovered in depth what took place before the actual implementation of a pilot initiative under development.

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## Appendices

Appendix A  
Participant Consent Form – English

**The Initial Planning Process of an International Service-Learning Initiative  
Under Development  
Consent to Participate in a Research Study  
University of the Incarnate Word**

**Introduction and Background Information:**

You are invited to participate in a research study conducted by Denise Krohn, doctoral candidate for the Dreeben School of Education at the University of the Incarnate Word, under the supervision of Alison Buck, Ph.D. The purpose of this qualitative study is to explore the initial planning process of an international service-learning (ISL) pilot initiative under development. The investigation intends to describe a collaboration between a southcentral Texas private university and a ministry of Catholic Sisters in Chimbote, Peru. You are being asked to contribute to this research because you engaged in or were affiliated with a case related to the interest of this study.

**Procedures:**

If you decide and agree to take part in this study, it will be requested that you:

1. Be interviewed, in-person or by video teleconferencing, for approximately 1 hour. Interviews will be audio-recorded at a location agreed upon between the researcher and participant. The researcher may be taking written notes during interviews.
2. Provide written sources, organizational archives, or other relevant information (i.e. group meeting notes, reports, planning records, PowerPoints, etc.) related to planning processes of an ISL initiative.

**Benefits and Risks of Being a Part of the Study and Confidentiality:**

A major possible benefit of this research is the addition of knowledge and understanding to the field of planning processes for ISL initiatives. This work is to be valued not only to scholars, but also by practitioners and providers. There is no to minimal perceived or anticipated risk for participants in this study. Any potential risks may include the possibility of participant identification based on your responses and on the small sample size of this particular study. Possible perceived or anticipated risk or harm may affect, but is not limited to, public opinion or reputation of related organization, people, or positions. Overall, anticipated benefits outweigh any potential minimal risks involved.

If you choose and agree to partake in this study, given the nature of the research conducted, there is a chance you could be identified. Your information related to this research includes descriptions of you as related to the topic, voice- or audio- recordings, transcriptions, and a signed consent form. However, it is anticipated that if identification is revealed, there will be no to minimal harm caused. This chance will be lessened by ensuring that the researcher will be the only person who has access to the collected records of information. If for any reason the information in the data has to be given to another party, it shall be only with the consent of the participant(s). In addition, your name and affiliated organization(s) will not be used in the transcription. Instead, you and your affiliated organization(s) will be assigned a pseudonym, as determined by the researcher. After your interview has been transcribed, you will have the opportunity to review it and express if the transcription accurately reflects your thoughts. You will also be asked if you have any additional information to note. You will have a choice of what information you want to contribute. You and your affiliated organizations' confidentiality and identity will continue to be protected with due diligence in any publication or presentation that is related to this study by the continued use of pseudonyms. Furthermore, the data will be stored in a safe place, namely a password-protected computer, in a locked file located at the researcher's home office, or under direct supervision of the researcher. Your information, recordings, and other archives collected will be destroyed, through electronic deletion or shredding of hardcopies, after transcription, data analysis, and other research-related use is completed and the dissertation study terminated. Following normal timelines and



procedures regarding audio recordings and data collected, the researcher will have up to 5 years to maintain the records in the identified secure settings (i.e. a password-protected computer or in a locked file located at the researcher's home office).

Ethical training and supervision of the researcher will ensure that all research remains focused on planning processes and ISL experiences from the participants' point-of-view, and not based on the opinion of the researcher.

**Voluntary Nature of the Study:**

Participation is voluntary and does not warrant any penalties. Your rights include:

- refusal to participate without penalty of any kind;
- terminating your participating at any time, including leaving during the interview or not providing planning records or materials; and
- to be informed of the study's findings after it concludes.

**Contacts and Inquiries:**

If you have questions, please ask them at any time. If you have additional questions later or you wish to report a problem that may be related to this study, contact:

Denise Krohn  
(210) 274-0085  
dkramon@student.uiwtx.edu

Alison Buck, Ph.D.  
(210) 828-2224, ext. 236  
wgc.mabuck@gmail.com

To contact the University of the Incarnate Word committee that reviews and approves research with human subjects, the Institutional Review Board (IRB), and ask any questions about your rights as a research participant, call: UIW IRB, Office of Research Development (210) 805-3036.

**Statement of Consent:**

If you understand the expectations for this research, have all of your questions answered to your satisfaction, and are willing to participate in this study, please sign and date this consent form in the space provided. Participant signature on this form indicates that the participant:

- is 18-years-old or older by date of signature;
- consents to voluntarily take part in this research study;
- agrees to be recorded;
- read and understands the information given above; and
- had the information above explained in the participant's primary language.

Participant signature:

Researcher signature:

Participant name:

Researcher name:

Denise Krohn

Date:

Date:

Appendix B  
Participant Consent Form – Spanish

**El proceso de planificación inicial de una iniciativa piloto de aprendizaje-servicio internacional  
en desarrollo  
Consentimiento para participar en un estudio de investigación  
University of the Incarnate Word**

**Introducción y antecedentes:**

Están invitados a participar en un estudio de investigación realizado por Denise Krohn, candidata a doctorado de Dreeben School of Education en University of the Incarnate Word, bajo la supervisión de Alison Buck, p.H.d. El propósito de este estudio cualitativo es explorar el proceso inicial de planificación de una iniciativa piloto de aprendizaje-servicio internacional (ISL) en desarrollo. La investigación tiene la intención de describir una colaboración entre una universidad privada del centro-sur de Texas y un ministerio de unas hermanas católicas en Chimbote, Perú. Se le pide a Usted contribuir en esta investigación, ya que participó o estaba afiliado con un caso relacionado con el interés de este estudio.

**Procedimientos:**

Si usted decide y acepta participar en este estudio, se le solicitará que:

1. Sea entrevistado, en persona o por teleconferencia por vídeo, de aproximadamente 1 hora.  
Entrevistas será audio-grabación en un lugar acordado entre la investigadora y el participante.  
La investigadora puede tomar notas escritas durante las entrevistas.
2. Proporcionar documentos escritos, archivos organizativos, u otra información relevante (es decir, notas de reuniones de grupo, resúmenes, informes de planificación o notas, PowerPoints, etc.) relacionados con la planificación del procesos de una iniciativa ISL.

**Beneficios y riesgos de ser parte del estudio y la confidencialidad:**

Una ventaja posible de esta investigación es principalmente la adición de conocimiento y entendimiento al área de planear procesos para iniciativas ISL. Este trabajo será valorado no sólo por los eruditos, sino también por los profesionales y proveedores. Hay ningún hasta riesgo mínimo percibido o esperado para participantes en este estudio. Cualquier riesgo potencial puede incluir la posibilidad de la identificación de Usted basada en sus respuestas y en el pequeño tamaño de muestra de este estudio en particular. El percibido o esperado posible riesgo o daño pueden afectar, pero no limitados a, relacionados pública opinión o reputación de la organización, la gente, o los posiciones. En general, hay más beneficios que cualesquiera riesgos mínimo potencial implicado en la conducción de este estudio.

Si Usted elige y acepta participar en este estudio, dado la naturaleza de la investigación realizada, hay una posibilidad que pudiera ser identificado. Su información relacionada con esta investigación incluye descripciones de Usted como relacionado con el tema, voz - o de audio - grabaciones, transcripciones, y una forma de consentimiento firmada. Sin embargo, se prevé que, si la identificación se revela, causará ningún hasta mínimo daño. Esta oportunidad se reducirá al asegurar que la investigadora será la única persona que tiene acceso a los registros de información. Si por alguna razón la información de los datos ha de ser entregado a otra persona, deberá ser únicamente con el consentimiento de los participantes. Además, su nombre y organización(ones) afilada(s) no se utilizará en la transcripción. En cambio, se le asignará un seudónimo a su nombre y organización(ones) afilada(s), según lo determinado por la investigadora. Después de que su entrevista haya sido transcrita, Usted tendrá la oportunidad de revisarla y expresar si la transcripción refleja con exactitud sus pensamientos. También se le pedirá si tiene información adicional para anotar. Usted tendrá la opción de decidir qué información desea contribuir. La confidencialidad y la identidad de usted y sus organizaciones afiladas seguirán siendo protegidos con la diligencia debida en cualquier publicación o presentación que está relacionada con este estudio por el uso continuado de seudónimos. Además, los datos se almacenarán en un lugar seguro, a saber, una computadora con contraseña protegida, en un archivo cerrado con llave localizado en la oficina de la investigadora, o en supervisión directa de la investigadora. Su información, grabaciones, y otros archivos recogidos serán destruidos, por la eliminación electrónica o la trituración de copias en papel, después de transcripción, análisis de datos, y otro uso relacionado con la

investigación es completado y el estudio de tesis doctoral ha terminado. Siguiendo los plazos y procedimientos normales con respecto a las grabaciones de audio y los datos recogidos, la investigadora tendrá un máximo de 5 años para mantener los registros en la configuración de seguridad identificados (es decir una computadora protegida por contraseña o en un archivo cerrado con llave localizado en la oficina de la investigadora).

La formación ética y supervisión de la investigadora se asegurarán de que toda investigación siga centrada en procesos de planificación y experiencias ISL de los participantes, punto de vista y no en base a la opinión de la investigadora.

**Carácter voluntario del estudio:**

La participación es voluntaria y no tiene ningunas sanciones. Sus derechos incluyen:

- negarse a participar sin alguna penalización;
- terminar su participación en cualquier momento, incluyendo el tiempo durante la entrevista o no dar otros materiales; y
- estar informado de los resultados del estudio después de que concluye.

**Contactos y consultas:**

Si usted tiene preguntas, por favor pregunte en cualquier momento. Si usted tiene preguntas adicionales más adelante o desea reportar un problema que puede estar relacionado con este estudio, comuníquese con:

Denise Krohn  
(210) 274-0085  
dkramon@student.uiwtx.edu

Alison Buck, Ph.D.  
(210) 828-2224, ext. 236  
wgc.mabuck@gmail.com

Para contactar con el comité que revisa y aprueba la investigación del University of the Incarnate Word, la Institutional Review Board (IRB), y para ser preguntas acerca de sus derechos como participante de la investigación, llama: (210) 805-3036.

**Declaración de consentimiento:**

Si Usted entiende las expectativas para esta investigación, tiene todas sus preguntas contestadas a su satisfacción, y está dispuesto a participar en este estudio, por favor firme y feche este formulario de consentimiento en el espacio de abajo. Firma del participante en esta forma indica que el participante:

- tiene 18 años o más al momento de la fecha de la firma;
- presta su consentimiento para participar voluntariamente en esta investigación;
- está de acuerdo grabarse;
- leyó y entendió la información dada anteriormente; y
- la información anterior fue explicada en el idioma primario del participante.

Firma del participante:

Firma de la investigadora:

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Nombre del participante:

---

Nombre de la investigadora:

Denise Krohn

Fecha:

Fecha:

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Appendix C  
Interview Protocol – English

\*Follow up, clarifying questions will be asked as necessary, throughout interview

Primary Interview Questions for Leaders and Coordinators of the Peru 2015 Initiative

1. What was your role in the Peru 2015 initiative?
2. How did the Peru 2015 initiative develop?
3. How did you prepare for the Peru 2015 initiative?
4. Do you think there were aspects that worked well? If so, what do you think worked well?
5. What would you change?
6. What recommendations would you give to others with responsibilities in partaking in the process of planning the development of such an initiative?
7. What guided your decisions when planning for the Peru 2-15 initiative?
8. Are there any additional comments you would like to make regarding the process of planning for the development of the Peru 2015 initiative?

Secondary Interview Questions for Leaders and Coordinators of the Peru 2015 Initiative

- Who else was involved and what was their role?
- What were other considerations do you recommend be taken when developing this initiative?
- How do you describe the process of interaction among members of the Peru 2015 initiative?

Primary Interview Questions for General Members of the Peru 2015 Initiative

1. What was your role in the Peru 2015 initiative?

2. How do you describe the Peru 2015 initiative?
3. Describe the preparation for the Peru 2015 initiative.
4. How did you personally prepare for the Peru 2015 initiative?
5. What considerations would you have taken if you were part of the team developing this initiative?
6. Do you think there were aspects that worked well? If so, what do you think worked well?
7. What would you change?
8. What recommendations would you give to others with responsibilities in partaking in such an initiative?
9. Are there any additional comments you would like to make regarding the process of planning for the development of the Peru 2015 initiative?

#### Secondary Interview Questions for General Members of the Peru 2015 Initiative

- How do you describe the process of interaction among members of the Peru 2015 initiative?

Appendix D  
Interview Protocol – Spanish

\*Follow up, clarifying questions will be asked as necessary, throughout interview

*Primary Interview Questions for Leaders and Coordinators of the Peru 2015 Initiative*

1. What was your role in the Peru 2015 initiative?
  - ¿Cuál era su papel en la iniciativa de 2015 de Perú?
2. How do you describe the Peru 2015 initiative?
  - ¿Cómo describe usted la iniciativa de 2015 de Perú?
3. How did the Peru 2015 initiative develop?
  - ¿Cómo se desarrolló la iniciativa de 2015 de Perú?
4. Describe the preparation for the Peru 2015 initiative.
  - Describa la preparación para la iniciativa de 2015 de Perú
5. How did you prepare for the Peru 2015 initiative?
  - ¿Cómo se preparó usted para la iniciativa de 2015 de Perú?
6. What considerations were part of the development of this initiative?
  - ¿Qué consideraciones eran parte del desarrollo de esta iniciativa?
7. Who else was involved and what was their role?
  - ¿Quién más estuvo implicado y cuál era su papel?
8. How do you describe the process of interaction among members of the Peru 2015 initiative?
  - ¿Cómo describe usted el proceso de interacción entre miembros de la iniciativa de 2015 de Perú?
9. Do you think there were aspects that worked well? If so, what do you think worked well?
  - ¿Piensa usted que había aspectos que trabajaron bien? ¿De ser así, qué piensa usted trabajó bien?

10. What would you change?

- ¿Qué cambiaría usted?

11. What recommendations would you give to others with responsibilities in partaking in the process of planning the development of such an initiative?

- ¿Qué recomendaciones daría usted a otros con responsabilidades en participar en el proceso de planear el desarrollo de tal iniciativa?

12. What other considerations do you recommend be taken when developing this initiative?

- ¿Qué otras consideraciones recomienda usted ser tomado desarrollando esta iniciativa?

13. What guided your decisions when planning for the Peru 2015 initiative?

- ¿Qué dirigió sus decisiones planeando para el Perú 2015 iniciativa?

14. Are there any additional comments you would like to make regarding the process of planning for the development of the Peru 2015 initiative?

- ¿Hay algún comentario adicional que le gustaría hacer en cuanto al proceso de planificación para el desarrollo de la iniciativa de 2015 de Perú?

Appendix E  
IRB Approval



10/14/2016

Denise Krohn

Dear Denise:

Your request to conduct the study titled *The Initial Planning Process of an International Service-Learning Pilot Initiative Under Development* was approved by expedited review on 10/14/2016. Your IRB approval number is 16-10-004. Any written communication with potential subjects or subjects must be approved and include the IRB approval number.

Please keep in mind these additional IRB requirements:

- This approval is for one year from the date of the IRB approval.
- Request for continuing review must be completed for projects extending past one year. Use the **IRB Continuation/Completion form**.
- Changes in protocol procedures must be approved by the IRB prior to implementation except when necessary to eliminate apparent immediate hazards to the subjects. Use the **Protocol Revision and Amendment form**.
- Any unanticipated problems involving risks to subjects or others must be reported immediately.

Approved protocols are filed by their number. Please refer to this number when communicating about this protocol.

Approval may be suspended or terminated if there is evidence of a) noncompliance with federal regulations or university policy or b) any aberration from the current, approved protocol.

Congratulations and best wishes for successful completion of your research. If you need any assistance, please contact the UIW IRB representative for your college/school or the Office of Research Development.

Sincerely,

Ana Wandless-Hagendorf, PhD, CPRA

Ana Wandless-Hagendorf, PhD, CPRA  
Research Officer  
University of the Incarnate Word IRB



## Appendix F IRB Extension Approval



October 10 2017

PI: Mrs. Denise Krohn Ramon

Protocol title: The Initial Planning Process of an International Service-Learning Pilot Initiative Under Development

Denise:

Your request for continued review of Expedited protocol 16-10-004 titled "The Initial Planning Process of an International Service-Learning Pilot Initiative Under Development" was approved. This approval will expire **one year** from 10/10/2017.

Please keep in mind these additional IRB requirements:

- Request for continuing review must be completed for projects extending past one year. Use the **IRB Continuing Review Request** form.
- Changes in protocol procedures must be approved by the IRB prior to implementation except when necessary to eliminate apparent immediate hazards to the subjects. Use the **IRB Amendment Request** form.
- Any unanticipated problems involving risks to subjects or others must be reported immediately.

Approved protocols are filed by their number. Please refer to this number when communicating about this protocol.

Approval may be suspended or terminated if there is evidence of a) noncompliance with federal regulations or university policy or b) any aberration from the current, approved protocol. Congratulations and best wishes for successful completion of your research. If you need any assistance, please contact the UTW IRB representative for your college/school or the Office of Research Development.

Sincerely,

*Ana Wandless-Hagendorf, Ph.D., CPRA*

Ana Wandless Hagendorf, PhD, CPRA  
Research Officer, Office of Research Development  
University of the Incarnate Word  
(210) 805-3036  
[wandless@uiwtx.edu](mailto:wandless@uiwtx.edu)

Appendix G  
Participant Profile Summary

Participants Profile Summary	Role	Planning Process	Positive Attributes	Collaboration	Recommendations
Interviewee 1: Non-Profit Organization Leader	<ul style="list-style-type: none"> <li>● Liaison</li> <li>● Logistics</li> <li>● Coordinator</li> </ul>	<ul style="list-style-type: none"> <li>● Based on community need</li> <li>● Interaction via meetings &amp; partner contact</li> </ul>	<ul style="list-style-type: none"> <li>● Collaboration</li> </ul>	<ul style="list-style-type: none"> <li>● Organic</li> <li>● Fluid</li> <li>● Networking</li> </ul>	<ul style="list-style-type: none"> <li>● Logistical next steps</li> <li>● Scouting</li> <li>● Communication</li> </ul>
Interviewee 2: University Assistant Professor and Vision Campaign Leader	<ul style="list-style-type: none"> <li>● Liaison</li> <li>● Logistics</li> <li>● Coordinator</li> </ul>	<ul style="list-style-type: none"> <li>● Understanding</li> <li>● Learning</li> <li>● Interaction via networking</li> </ul>	<ul style="list-style-type: none"> <li>● Scouting</li> </ul>	<ul style="list-style-type: none"> <li>● Many involved</li> <li>● Co-Construction</li> </ul>	<ul style="list-style-type: none"> <li>● Pilot experience</li> <li>● Prep time</li> <li>● Service-learning awareness</li> </ul>
Interviewee 3: University Office Administrator	<ul style="list-style-type: none"> <li>● Support (Oversee) Logistics</li> <li>● Coordinator (Ideas)</li> </ul>	<ul style="list-style-type: none"> <li>● Time consuming</li> <li>● Networking (Interaction)</li> <li>● Scouting (Interaction)</li> </ul>	<ul style="list-style-type: none"> <li>● Collaboration</li> <li>● Contributions</li> </ul>	<ul style="list-style-type: none"> <li>● Many involved</li> <li>● Communication</li> <li>● Reflection - Thinking through (Logistics)</li> </ul>	<ul style="list-style-type: none"> <li>● Pilot experience</li> <li>● Networking</li> </ul>
Interviewee 4: Non-Profit Organization Coordinator	<ul style="list-style-type: none"> <li>● Support</li> <li>● Liaison</li> <li>● Logistics</li> <li>● Coordinator</li> <li>● Administrative (Oversee) Meetings &amp; discussions</li> </ul>	<ul style="list-style-type: none"> <li>● Meeting (Interaction)</li> <li>● Conversations (Interaction)</li> <li>● Groundwork</li> </ul>	<ul style="list-style-type: none"> <li>● Special project - Prep guide</li> </ul>	<ul style="list-style-type: none"> <li>● Communication</li> <li>● Sharing</li> <li>● Thinking through (Logistics)</li> </ul>	<ul style="list-style-type: none"> <li>● Co-Construction</li> <li>● Experience &amp; expertise</li> </ul>
Interviewee 5: University Lead Administrator	<ul style="list-style-type: none"> <li>● Support</li> </ul>	<ul style="list-style-type: none"> <li>● Assigned personnel</li> <li>● Many involved</li> </ul>	<ul style="list-style-type: none"> <li>● Good rapport</li> <li>● Similarities</li> </ul>	<ul style="list-style-type: none"> <li>● Building rapport</li> </ul>	<ul style="list-style-type: none"> <li>● Reflection</li> <li>● Logistics</li> <li>● Time consuming</li> </ul>

	<ul style="list-style-type: none"> <li>● (Oversee) Mission &amp; strategic thinking</li> </ul>				<ul style="list-style-type: none"> <li>● Project size</li> <li>● Commitment</li> <li>● Networking</li> </ul>
Interviewee 6: University Faculty Member	<ul style="list-style-type: none"> <li>● (Vision Campaign) Expertise &amp; experience</li> <li>● Logistics</li> <li>● Coordinator</li> </ul>	<ul style="list-style-type: none"> <li>● Meeting &amp; networking (Interaction)</li> <li>● Interest</li> <li>● Experience</li> <li>● Time consuming</li> </ul>	<ul style="list-style-type: none"> <li>● Interaction</li> <li>● Overall preparation</li> </ul>	<ul style="list-style-type: none"> <li>● Respectful</li> </ul>	<ul style="list-style-type: none"> <li>● Pilot experience</li> <li>● Align</li> <li>● Emotions</li> <li>● Understanding</li> </ul>
Interviewee 7: Peruvian Lead School Administrator	<ul style="list-style-type: none"> <li>● Liaison</li> <li>● Logistics</li> <li>● Coordinator</li> </ul>	<ul style="list-style-type: none"> <li>● Networking &amp; Familiarizing (Interaction)</li> <li>● Scouting</li> </ul>	<ul style="list-style-type: none"> <li>● Vision campaign logistics</li> </ul>	<ul style="list-style-type: none"> <li>● Communication</li> <li>● Interaction</li> </ul>	<ul style="list-style-type: none"> <li>● Brainstorm ideas</li> <li>● Legal logistics</li> </ul>
Interviewee 8: University Student	<ul style="list-style-type: none"> <li>● (Vision Campaign) Logistics</li> </ul>	<ul style="list-style-type: none"> <li>● Meeting &amp; talking (Interaction)</li> <li>● Logistics</li> </ul>	<ul style="list-style-type: none"> <li>● Preparation</li> <li>● Reflection</li> </ul>	<ul style="list-style-type: none"> <li>● Meetings</li> </ul>	<ul style="list-style-type: none"> <li>● Understanding</li> <li>● Time to experience culture</li> </ul>
Interviewee 9: Peruvian Lead Clinic Administrator	<ul style="list-style-type: none"> <li>● Coordinator</li> </ul>	<ul style="list-style-type: none"> <li>● Coordinate</li> <li>● Networking &amp; communication (Interaction)</li> <li>● Co-construct</li> </ul>	<ul style="list-style-type: none"> <li>● Interaction - Building rapport</li> </ul>	<ul style="list-style-type: none"> <li>● Positive</li> </ul>	<ul style="list-style-type: none"> <li>● Time</li> </ul>

Appendix H  
Domain Analysis Worksheet

Artifact (domain analysis worksheet) showing the development of the domain analysis in chapter 4.

**GREEN = THEME FOR ALL PARTICIPANTS**

**BLUE = THEME FOR 8 OUT OF 9 PARTICIPANTS**

X – Included Term (4)	Interviewee	Semantic Relationship	Y – Cover Term
1. Bringing in <b>expertise</b> , knowledge, skills, and presence *link with experience?	1, 2, 3, 4, 5, 6 (387), 7, 8	Is a way to (means to an end) X is a way to Y (verbs)	(Share Individual) Contributions
2. Performing <b>roles</b> and responsibilities	1, 2, 3, 4, 5, 6, 7, 8, 9		
3. Expressing <b>personal</b> needs or desires / feedback	1, 2, 3, 4, 5, 6, 7, 8, 9		
4. <b>People power</b> / volunteering / help in one part	2, 4, 6, 7, 8, 9		

X – Included Term (5)	Interviewee	Semantic Relationship	Y – Cover Term
Following <b>vision</b> / <b>mission</b> - (4 charism, extension, continuation) / <b>goal</b> *combine – understand? (THOUGHT – THIS SETS PURPOSE FOR INITIATIVE) *add to knowing and following	1, 2, 3, 4, 5, 6 (goal), 7, 8 (goal), 9	Is a way to (means to an end) X is a way to Y (verbs)	Create Cohesive, Cooperative Group Dynamics (interviewee 6 – team building)
1. <del>Knowing</del> Learning and following <b>expectations</b> *combine – understand?	1, 2, 3, 5, 6, 8		
Getting to know *combine with knowing or understanding or rapport?	2, 5, 6, 7, 8, 9		
2. <b>Understanding</b> *combine with mission / expectations?	2, 4, 5, 6, 7, 8, 9		
3. Building and maintaining <b>rapport</b> (On-going relationship / follow-up / team building)	1, 2, 4, 5, 6, 7, 8, 9		

Nurturing natural, magnetic, organic relationships *combine with rapport	2, 4, 6, 8, 9		
Commissioning *combine with rapport? Or co-construction?	1, 3, 6		
4. <b>Co-constructing</b>	2, 4, 7, 8, 9		
Providing feedback and opinions *combine with co-construction	2, 4, 5, 6 (consult), 7, 8, 9		
Reciprocating *combine with co-construction	2, 5, 8, 9		
Interaction / participate *combine with co-construction	2, 4, 6, 7, 9		

\*thankful 28:00 interviewee 9 line 168

X – Included Term (4)	Interviewee	Semantic Relationship	Y – Cover Term
1. <b>Partnering</b> to connect *combine with network & liaison?	1, 2, 3, 5, 6, 7, 8, 9	Is a way to (means to an end) X is a way to Y (verbs)	Collaborate (to get started)
Connecting to network *combine with partner?	1, 2, 3, 4, 5, 7, 8, 9		
Being a liaison *combine with partner?	2, 4, 5, 6, 7, 9		
2. Figuring out (questions, unknown, and uncertainty) / <b>problem solving</b>	2, 5, 6 (adapt), 7		
3. <del>Bringing together</del> to connecting and aligning	1, 2, 3, 4, 5, 6, 7, 8, 9		
4. <b>Communicating</b> (via technology - Skype and emails, same language, reporting, long distance, and through talk / conversation / discussion)	1, 2, 3, 4 (262), 5, 6, 7, 8, 9		
5. <b>Meeting</b> *Quote: int. 7, 31:26 (372) : “importante de conocer les no, pero en persona, de cara a cara”	1, 2, 3, 4, 5, 6, 7, 8, 9		

\*web quote – Interviewee 47:39 (recording 2) – line 326

X – Included Term (5 / 6)	Interviewee	Semantic Relationship	Y – Cover Term
1. <b>Thought</b> processing / thinking through (reflection? Intentional?)	2, 3, 5, 6, 7, 8, 9	Is a way to (means to an end)	Prepare – quote from interviewee 2, 53:21 (line 480) / 53:53 (line 488)
Reflection *combine with thought processing?	2, 3, 4, 5, 6 (prayer), 7, 8, 9		

Brainstorming / give ideas *combine with thinking through?	2, 4, 7, 8	X is a way to Y (verbs)	
Finding fit and others with the same attitude / agreement *combine with reflection or intentionality?	2, 4, 5, 6, 7, 8		
Being intentional / conscious / aware / focus *combine with thought process?	1, 2, 3, 4, 5, 6, 7, 8, 9		
2. <b>Creating a guide</b> to learning about ISL - rules, location, purpose, action steps, training, procedures, etc.	2, 3, 4 (curriculum), 5 (protocol & train - (line 161 / 25:15), 6, 7		
3. <del>Setting</del> <b>coordinating logistics</b> – for travel and campaign	1, 2, 3, 4, 5, 6, 7, 8, 9		
4. <b>Doing the groundwork</b>	1, 2, 3, 4, 6, 7, 8, 9		
Coordinate to organize *combine with ground work?	2, 5, 6 (set up), 7, 8, 9		
Sharing information *combine with ground work?	2, 5, 6, 7, 8		
designating time and commitment (for implementation and sustainability) *time consuming	2, 5 (36:18, line 224) / 9 (12:09, line 74), 6, 7, 8		
5. (having previous related) <b>experience</b> *combine with scouting?	2, 4, 5, 6, 7, 8		
6. <b>Maybe merge SCOUT to PREPARE - scouting is a way to prepare</b> <b>**** OR have SCOUT as its own DOMAIN?????</b>			
X – Included Term	Interviewee	Semantic Relationship	Y – Cover Term
Exploring	5, 7	Is a way to (means to an end) X is a way to Y (verbs)	Scout (1, 2, 3, 6)
discovering	1, 2, 7		
Sensing	2, 3 (104), 4 (483), 7, 8		
familiarize	2, 4, 5, 7		
Learning about / investigate (context, people, and environment)	2, 3?, 5, 6 (recruit), 7 (aduanas), 9		
traveling (distance)	1, 3, 4, 7		

**OTHER DOMAINS TO CONSIDER:**

- Evaluator – interviewee 4 (1:10:36) line 491
- Need documented – interviewee 5 (line 2:93, part 2 6:30), interviewee 7 (documents for aduanas (line 158, 12:58)
- Unanswered as a pilot – interviewee (line 299, 6:58 part 2) / interviewee 6 -first time (line 12)
- Value others / partnerships – 2, 6, 7
- Uniqueness of initiative – interviewee 2, 6
- Feelings / emotions (overwhelming, comfort, joy, excitement, sense of value) – interviewee 2, 6, 8 (impact and value of service)
- Defining service-learning – interviewee 2 (46:51, line 418)

## Appendix I Timeline

The graphic summarizes occurrences for the initial planning process of the ISL pilot initiative between a southcentral Texas private university and a ministry of Catholic Sisters in Chimbote, Peru that developed between 2013 to 2015. Data from which the timeline was created came from participant interviews, organizational archived documents, and my planning and travel journal.

