

eaHarmony: Evaluating Education Abroad Partners for Long-Term Success

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Overview

Xavier University of LA

Winthrop University

UNC Charlotte

- Motivations, benefits, & goals of creating and evaluating partnerships
- Various types of strategic partnerships
- Examples of partnership review and evaluation processes
- Strategies for developing and establishing new partnerships
- Best practices, discussion, and resources

Motivations for Partnership Evaluations

- Accreditation
- Desire to expand/increase partnerships
- Desire to pare down partnerships for manageability
- Approving credit transfer

Benefits of Partner Evaluations

- Quality assurance
- Be prepared when there are questions from stakeholders
- Create resources
 - Assist with staff training
 - Assist with student advising
- Help in annual planning for site visits, conference meetings, etc.

Xavier University of Louisiana

- New Orleans, Louisiana
- Private Historically Black & Catholic University
- Bachelors, Masters, Doctorate Degrees
- Two colleges:
 - Arts and Sciences
 - Pharmacy
- 3,500 students



Study Abroad at Xavier

- 4-10 semester study abroad students annually
- 10-20 short-term participants annually
- 7 NEW exchange agreements
- 10 3rd party provider affiliations (Inherited)



- Xavier's international education partnerships are designed to pursue the goals of:
 - Promoting the Xavier Mission
 - Student Learning,
 - Curriculum building and course enhancement
 - Advancing research
 - Connecting to key parts of the world
 - Supporting and enhancing international ties and interest of the surrounding community
 - Tackling pressing global issues
 - Developing the international capacity of faculty & staff
 - Generating revenue through tuition grants

(Sutton and Obst, *The Changing Landscape of International Partnerships in Developing Strategic International Partnerships: Models for Initiating and Sustaining Innovative Institutional Linkages* published by IIE and the AIFS Foundation)

Forming more Strategic International Partnerships requires the development of overall partnership plans and policies

- **Going forward we are looking at:**
 - Taking stock of existing affiliations
 - Establishing a partnership approval process
 - Articulating overall partnership goals & strategies
 - Spreading a culture of partnership
 - Developing organized structures for managing partnerships
 - Providing financial and other support for partnerships
 - Drafting well crafted MOUs and Implementation Plans
 - Pursuing effective practices for sustaining partnerships
 - Establishing procedures for review, revise, or terminate

Taking stock of existing affiliations

- 3rd party affiliations
- Exchange agreements
- Faculty led programs
- HBCU consortium initiatives

- NEXT STEPS

Winthrop University

- Rock Hill, South Carolina (Charlotte metro area)
- Public comprehensive university
- Bachelors and Masters
- 6,000 students (5,000 UG/1,000 Grad)
- Four colleges:
 - Visual and Performing Arts
 - Arts and Sciences
 - Business
 - Education



Winthrop University

- 40-60 semester study abroad students annually
- 120-140 short-term participants annually
- 8 exchange agreements
- 11 direct enroll and 3rd party provider affiliations



How Winthrop categorizes partnerships

Affiliated

(21 programs)

- Exchanges
- Select direct enroll
- Select 3rd party provider

Approved

- 3rd party provider
- Direct enroll

Other programs

- Providers and direct enroll without prior relationship
- Subject to individual approval

Winthrop's Partnership Review Process

- Formalized in 2009
- Spurred by SACS reaffirmation process
- Started as a single-handed process
- Developed guiding principles and methods for evaluation based on university/departmental mission, vision, and goals
- Incorporated best practices in the field
 - *Forum on Education Abroad's Code of Ethics for Education Abroad* <http://www.forumea.org/documents/ForumonEducationAbroadCodeofEthics.pdf>
 - *NAFSA: Association of International Educators' Guide to Education Abroad for Advisers and Administrators* ("big green book")
- Created review forms

Review Forms

1. Program information form

- Designed for “arm chair” reviews and early reviews to assess feasibility
- Collects info on accreditation, size, academic calendar, academic offerings, costs, eligibility requirements, services for int’l students, housing

2. Site visit report form

- Capture relatively standardized information from site visits
- Prompts reviewer to look at academics, logistics, orientation, housing and campus life, health and safety
- Send with faculty and staff visiting current and prospective partners

Review Process and Cycle

- If students have attended an institution or program in the past, we will review their evaluations
- Faculty may review course syllabi or samples of student work
- In addition to conducting our own reviews, we solicit feedback from other institutions

Review Cycle

- Prepare reports to present to International Advisory Committee
- For SACS report, reviewed all existing partners against new guidelines and reviewed participation/exchange balances
- Now utilize guidelines and review process for all prospective partners
- Intention is to review partnerships every 5 years, if not sooner, based on renewal timelines

Determining Whether to Establish a New Partnership

- Emphasis on sustainability
 - Exchanges
 - strong support from one or more academic departments
 - high likelihood of student interest
 - fair, realistic, and mutually beneficial terms of agreement
 - Direct enroll
 - evaluate on quality (academic, administrative, student services, health & safety)
 - whether the program fulfills a need
 - cost
 - terms of agreement
 - 3rd party provider
 - quality (administrative, student services, health & safety)
 - their evaluation and selection processes
 - value
 - NAFSA article on ensuring the quality of others' EA programs <http://www.nafsa.org/resourcelibrary/Default.aspx?id=8371>

Determining Whether to Establish a New Partnership

- Try to avoid
 - Partnerships for partnerships' sake (aka quantity over quality)
 - Partnerships that overlap or duplicate other offerings greatly
 - Creating a new partnership to benefit only one student
- International Center, involved department(s) and Advisory Committee must all be on board before moving forward with a partnership
- Signatories on partnerships
 - Reciprocal exchange: IC Director, VP for Academic Affairs, President
 - Direct enroll and 3rd party providers: IC Director

Other uses for a review process

- To edit approved programs lists if they have become unmanageable
- Plan staff travel (what sites have not been visited lately or are up for review?)
- Determining whether to pursue
- Determining whether to renew
- Help move people beyond enthusiasm to evaluate opportunities for long-term success
- Provide foundation of quality for other initiatives (e.g. curriculum integration)

The University of North Carolina at Charlotte

- 25,000 students (20,000 undergraduate, 5,000 grads)
- Large public research institution
- 550 students abroad each year on semester and short-term programs (60% short term)
- About 75 exchange students on campus each semester
- Study abroad programs include: Exchange (consortium & bilateral), faculty-led, affiliate, direct-enroll

The Office of International Programs

- Office of Education Abroad (outgoing exchanges & SA)
- International Students and Scholars Services (incoming exchange students, visiting scholars, degree seeking students)
- English Language Training Institute/ Intercultural Outreach Programs (incoming short-term programs)
- Office of International Programs – Administrative Unit (faculty exchanges, campus internationalization & MOUs)

New MOU's and Exchange Agreements

Terminology and process needs to be clearly defined by your campus.

“Procedures Pertaining to International Exchange Agreements”

[http://oip.uncc.edu/sites/oip.uncc.edu/files/media/International Exchange Agreement Procedure.pdf](http://oip.uncc.edu/sites/oip.uncc.edu/files/media/International_Exchange_Agreement_Procedure.pdf)

MOU (Memorandum of Understanding) - recognizes a shared interest between parties in exploring together potential projects, funding, or other arrangements that may lead to specific projects in the future; no clear projects or plans are delineated.

International Exchange Agreement - a written document outlining the terms and conditions providing for an exchange of faculty, staff, or research activity between UNC Charlotte and a university or other institution located outside the territorial boundaries of the United States of America.

New MOU's and Exchange Agreements

“Procedures Pertaining to International Exchange Agreements”

Considerations

- Significant exchange possibilities should exist in at least one of the following areas: student, faculty, or research
- The initiative should have significant support from at least one academic department
- If funding comes initially from external sources, e.g. federal grants, the institutional commitment should continue beyond the life of the grant unless explicitly stated that the relationship is active only during the administration of that grant
- For student exchanges, potential should exist for long-term interest and activity
- A benefit to UNC Charlotte must be demonstrated

New MOU's and Exchange Agreements

“Procedures Pertaining to International Exchange Agreements”

- **Applicability**
- **Types of Agreements**
- **Role of the Office of International Programs**
- **Guidelines for Drafting Exchange Agreements**
- **Authorization and Approval Process**
- **Procedural Checklist (with signatures from the College Dean, OIP Assistant Provost, and “Chancellor/Provost/or Authorized Designee)**
- **Exchange Agreement Worksheet**

http://oip.uncc.edu/sites/oip.uncc.edu/files/media/International_Exchange_Agreement_Procedure.pdf

Exchange Agreements Review

- Yearly review of UNC Charlotte agreements by committee
- Committee consisting of members of the International Program units
- Quarterly meetings to discuss random sampling of 25% of UNC Charlotte agreements
- Review of committee findings and update to OIP University Council twice per calendar year

Exchange Agreements Review

Information compiled and distributed to the committee:

- Scope, nature, and purpose of the partnership
- Activity & balance
- Relevant dates of the arrangement
- Credit & course equivalency issues
- Student & faculty feedback/evaluations (including discussion of remediation strategy, if applicable)
- Partner communication
- Contact information will be updated

Consortium Partners

- UNC Charlotte is a member of ISEP and the University of North Carolina Exchange Program.
- Lead member in a semester in Spain consortium
- Consortiums are a great way to increase partnerships and share the process evaluating partners.
- We don't include the consortium partners in our yearly review because we expect the administrative body of the consortium to do it.
- Allows for access to partners that would be unsustainable in any other way.

Affiliate Programs

- 3rd Party Provider and Direct Enrolls
- We do not sign partnership agreements with providers
- List of programs **approved for credit** is provided to all students, but students can get others approved.
- Approval means that the student's academic credit from the experience will be accepted by UNC Charlotte : **an official transcript from an accredited, degree awarding institution.**
- Approval for credit does not indicate UNC Charlotte's review, endorsement, or approval of that program's policies or procedures
- UNC Charlotte is not responsible if the program doesn't meet the student's expectations. It is the student's responsibility to research the program and select the program.

Best Practices (our compilation!)

- Assess your institutional priorities and needs
- Know your institution's policies
- Identify stakeholders
- Create a process/forms to evaluate programs consistent with identified priorities and needs
- Draw on multiple resources for reviews (student evaluations, feedback from peers, site visits, etc.)
- Centralize and formalize a process, if possible
- Use that process and keep documentation

Discussion

1. Do you have a partnership evaluation process?
2. If so, do you use it? If not, do you intend to create one?
3. What are the motivations at your institution for having an evaluation or review process?
4. Who is responsible for the process?
5. Who are the key stakeholders in your process (on- and off-campus)?
6. Are there aspects of the process that you would like to change or include based on anything discussed today?

Resources

- *NAFSA'S Guide to Education Abroad for Advisors and Administrators*-chapter on assessment and evaluation
- *Developing Strategic International Partnerships: Models for Initiating and Sustaining Innovative Institutional Linkages* published by IIE and the AIFS Foundation
- Managing Education Abroad: How to Ensure the Quality of Other Providers' EA Programs <http://www.nafsa.org/resourcelibrary/Default.aspx?id=8371>
- Forum Standards of Good Practice
- UNC Charlotte's International Exchange Agreement Procedure http://oip.uncc.edu/sites/oip.uncc.edu/files/media/International_Exchange_Agreement_Procedure.pdf
- Cal State executive order regarding approved program providers: <http://www.calstate.edu/AcadAff/codedmemos/AA-2007-25.pdf>

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