Outbound Mobility
Best Practice Guide for Australian Universities
Disclaimer:

The information provided in this Guide is to be used as a guide only. This document does not purport to be legal advice and is provided as a general guide only. Some information may become superseded through changes to the law. Users/ readers should seek advice from a legal practitioner in relation to any particular legal issues.

Research for The Guide was undertaken between April and November 2011 based on surveys, interviews, contributions and research of public-domain information. Please note that information and resources may have changed, been superseded or no longer apply since that time. Whilst every effort has been made to ensure accuracy, the guide is indicative and should be verified by the cited institution if required.

Acknowledgements

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE), Australian Education International (AEI) and managed by AIM Overseas.

This resource would not have been possible without the contribution of the members of the industry based Steering Committee and the institutions who have contributed ideas, examples and time to the Guide.

This Guide draws on aspects of work from the Department’s 2010 VET Outbound Mobility Toolkit in many places. The VET Outbound Mobility Toolkit was co-Authored by Rob Malicki and Rebecca Hall.
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Outbound Mobility Best Practice Guide for Australian Universities

Section A:
Overview

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas
About the Guide

Background

The development of the Guide has been funded by Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE).

The Guide is a collection of examples and contributions from Australian universities that, as a whole, indicate areas of good, strong and best practice across the country. It is not a ranking or judging exercise.

The Guide includes:

- Specific examples, case studies, policies, templates and other tools in relation to a broad range of aspects of outbound mobility in Australian universities
- Practical suggestions of ways for institutions to improve areas of their outbound mobility operations
- Strategies to identify and implement mobility program efficiencies
- Strategies for single-office and multi-campus institutions on ways to deal with the inherent challenges of their mobility operations
- Discussion of the key barriers to outbound mobility and ways to overcome them.

The Guide is the result of more than 80 hours of interviews, two surveys, 250 hours of desktop research and writing time, and literally countless hours spent by universities developing their outbound mobility programs and the more than 200 examples and templates that appear in the Guide.

This Guide draws on aspects of work from the Department’s 2010 VET Outbound Mobility Toolkit. Section N on Establishing New Mobility Projects and several of the templates and tools, in particular, are replicas or contain similar information to the 2010 Toolkit.

Topics Covered

The Guide addresses the following topics in varying degrees of detail, not all topics appear in a separate section:

- Barriers to Outbound Mobility
- Benefits of Outbound Mobility
- Budgets and Finance
- Credit and Acknowledging Experiences
- Degree Structures
- Establishing New Mobility Projects
- Exchange Program Management
- Funding: Scholarships, Grants and OS-HELP
- Glossary of Key Student Mobility Terms
- Multi-Campus Institutions
- Outbound Mobility Planning
- Partnerships, Agreements, Balances and Due Diligence
- Pre-departure Preparation
- Promoting Programs
- Quality Assurance
- Re-Entry
- Risk Management, Insurance and Critical Incidents
- Single Person Offices
Consultant

Rob Malicki, Director and Lead Consultant at AIM Overseas (the Australian Institute for Mobility Overseas) undertook the data collection, collation, template development and authoring of the Guide.

Important contributions have been provided by: Alan Olsen (SPRE P/L), Rob Lawrence (Prospect Marketing), the Australian Universities International Directors Forum and Shaunna Barrie (Fusiform Graphic Design). Rebecca Hall of International Education Resources Group was co-Author of the Department’s 2010 VET Outbound Mobility Toolkit, which has been drawn on in this Guide. The author acknowledges the enormous contribution of the late Prof. Tony Adams to Australian outbound mobility.

Steering Committee

The development of the Guide has been supported by a Steering Committee of outbound student mobility experts from around Australia. They are:

- Trevor Goddard, Manager Monash University Abroad, Monash University
- Jackie Taylor, Manager Student Mobility, Deakin University
- Karen English, Coordinator Student Mobility, University of South Australia
- Linda Rust, Manager Charles Sturt University Global, Charles Sturt University
- Natalie Ilott, Senior Study Abroad / Exchange Officer, Edith Cowan University
- Kay Wolfs, Team Leader Partnership Services, Edith Cowan University
- Steve McDonald, Student Mobility Coordinator, The University of Newcastle
- Stuart Hibberd, Manager Education Abroad Student Programs, University of Melbourne
- Heidi Piper, Manager Study Abroad and Exchange, Griffith University
- Dawn Koban, Assistant Director, International Relations, RMIT University
- Kadi Taylor, Assistant Director, ISMS, DIISRTE
- Amanda Pasfield, Assistant Director, ISMS, DIISRTE.
Best Practice Guide Icons

Main Resources:

- Policies
- Checklists
- Diagnostic Tools
- Templates
- Case Studies
- Reference Tools

Additional Icons:

- Efficiency Measures
- Single Person Offices
- Multi-campus Institutions
- New Program
- Developing Program
- Mature Program
Snapshot of Outcomes from the Outbound Mobility Best Practice Guide for Australian Universities

Benchmarking shows that Australia is world class when it comes to facilitating outbound mobility experiences. The Steering Committee for the Best Practice Guide spent time considering some of the positives and challenges of Australian university outbound mobility.

What already works well in Australian Outbound Mobility?

- Commitment and enthusiasm
- Professional and passionate staff
- Collaborative sector with good sharing and communication
- Government support and institutional buy in
- Institutions respond to demand
- Degree structures with integrated mobility or mobility enabling aspects
- Funding from Government and universities is good
- Exceptional benchmarking
- Active student mobility interest group
- OS-HELP
- Good reciprocity with inbound
- Strong pre-departure advising
- International leadership programs
- Increasing short term to Asia
- Good relationships with partners

Challenges for Australian Outbound Mobility

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Can we do something about it?</th>
</tr>
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<tbody>
<tr>
<td>Language take-up declining nationally</td>
<td>No</td>
</tr>
<tr>
<td>Difficulties getting course outlines from partners</td>
<td>Yes</td>
</tr>
<tr>
<td>Understanding of purpose / nature of mobility by faculty, students, parents, professional staff etc.</td>
<td>Yes</td>
</tr>
<tr>
<td>Things change</td>
<td>No</td>
</tr>
<tr>
<td>Accreditation: within students’ degree programs (i.e. credit), conflict with accrediting body requirements e.g. Nursing.</td>
<td>Yes</td>
</tr>
<tr>
<td>Resourcing: staffing, scholarships, systems and money</td>
<td>Yes</td>
</tr>
<tr>
<td>Need for diversification: programs and student cohorts</td>
<td>Yes</td>
</tr>
<tr>
<td>Managing growth and scalability</td>
<td>Yes</td>
</tr>
<tr>
<td>Reciprocity</td>
<td>Yes</td>
</tr>
<tr>
<td>Inactive or poor-quality partnerships</td>
<td>Yes</td>
</tr>
<tr>
<td>Getting senior management support</td>
<td>Partially</td>
</tr>
<tr>
<td>Differing lexicon causing confusion</td>
<td>Yes</td>
</tr>
<tr>
<td>Managing crises</td>
<td>Yes</td>
</tr>
<tr>
<td>Poor use of technology</td>
<td>Yes</td>
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<tr>
<td>Lack of awareness by students</td>
<td>Yes</td>
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<tr>
<td>Poor tracking / use of returned students</td>
<td>Yes</td>
</tr>
<tr>
<td>Visas</td>
<td>No</td>
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<tr>
<td>Measuring of outcomes</td>
<td>Yes</td>
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This table shows us that many of the challenges to outbound mobility can actually be managed in some way.
Some Key Learnings from the Best Practice Guide

Generalisations and Trends

As part of the data collection process, and writing of the Guide, a number of broad trends and generalisations about outbound mobility in Australian universities became clear.

As always, for every generalisation there is always an exception.

- Exchange remains the cornerstone of most university mobility programs.
- There is a strong trend towards growing short programs and alternative mobility options.
- Several universities are establishing degree structures with outbound experiences integrated or required.
- Universities are looking to use outbound mobility as part of a high-value offering to their top students, or top potential students.
- Outbound mobility is a key inclusion for institutions’ Australian Higher Education Graduation Statements (AHEGS).
- Resourcing (funding and staffing) can be a major issue but many institutions have not implemented fundamental efficiency measures. Many institutions are unable to take time to ‘be strategic’.
- Increasing inclusion of outbound targets and KPIs for key non-mobility staff e.g. Deans or Heads of Departments.
- Numerous institutions are evaluating their IT systems (web, database etc), but there is strong anecdotal evidence that institutions are underspending on key efficiency-generating resources – data entry is still overwhelmingly common.
- Evaluations are generally not well collected nor effectively used.
- Returned students are not generally used effectively (there are some striking exceptions to this).
- Many institutions are taking a more holistic approach to mobility: integrating it more with recruitment activities and looking for a return on their investment.
- Several universities are strong on ‘pipeline’ and ‘funnel’ management.
- There is a strong trend towards improving risk management provisions, including travel insurance and using professional risk management companies.
- Several universities are implementing, or considering, application fees.
- Many universities are looking to review existing partnerships with mind to either culling or expanding their agreements.
- Deepening engagement with existing partners is a priority for many universities.
- There has been significant growth in almost all types of mobility programs over recent years, as well as growth in funding support for those activities.
- Short term options are growing proportionally much faster than longer programs and now represent a majority of all experiences.
- A number of universities have decided to embrace an ‘all types of mobility’ model by opening ‘International Leadership’ or ‘Global Citizenship’ programs as a way of acknowledging all outbound experiences.
- Many universities are focusing on credit-bearing opportunities. Semester exchange is still the priority for the significant majority of institutions.
- There is a trend towards trying to capture information centrally about all outbound opportunities available at an institution.
Directly managing students’ enquiries and applications takes up by far the bulk of advisors’ time. This clearly suggests that whilst personal, consistent service is critical in managing outbound exchanges, institutions also need to be able to generate economy-of-scale communication responses in order to deal with the volume of enquiries.

**Examples of Practice**

The Best Practice Guide contains literally hundreds of examples of practice from around Australia. These range from quick, easy-to-implement solutions to complex initiatives.

Below is a selection of some of the standout ideas and examples in the Guide – they are examples of excellent practice, with a caveat that not all solutions will work for every university. This list is not exhaustive.

**Credit, Enrolment and Recognising Experiences**

- Many universities require students to have subjects approved as part of the application process for exchange.
- A number of universities no longer require students to produce course outlines from the overseas institution where the course will only count back as an elective.
- A number of universities require students to complete their enrolment form for exchange at the pre-departure session.
- Several universities refuse to transfer credit until students have returned an evaluation or report on their exchange experience.
- One university fines students $100 if they are not enrolled by Census if it’s the student’s fault.
- One of Curtin University of Technology’s US partners changed part of their health curriculum to match Curtin’s so mobility now works very well with them.
- A number of universities are recognising international learning experiences through extra-curricular International Leadership or Global Citizenship programs.
- University of South Australia has a table on their website that gives students a broad indication of how many courses they should be doing at a particular university overseas in order to be full-time.

**Managing Exchange Programs**

- At least one university processes exchange applications on a rolling basis.
- University of New South Wales has a non-refundable $200 application fee. Students pay through the cashier’s office as part of their application.
- Charles Sturt University and Southern Cross University use video conferencing to manage some aspects of dealing with their students on satellite campuses.
- Several universities require students to attend an information session prior to being given access to the application form for exchange. University of Western Sydney make a podcast of their info session in case students can’t make it.
- The Australian National University advertise a $100 withdrawal fee to ensure that students who submit an online application are committed to the process. This minimises drop outs and reinforces the commitment required to the exchange program.
- The University of Newcastle has an online ‘pre-assessment of eligibility’ questionnaire.
- Swinburne University of Technology does an excellent job of monitoring students’ progress through the application/preparation process by reviewing the application status of students weekly.
- Flinders University has a Standard Operating Procedure for outbound mobility – a master process for managing students.
• Swinburne University of Technology has two deadlines – an early ‘priority’ deadline and a late one. The first round of assessments happen after the first ‘priority’ deadline. Applications for the late deadline are processed as they come in.

• Deakin University students with an average mark underneath the required exchange criteria must have a plan approved by an academic skills advisor for how they are going to improve their marks prior to going on exchange. Since implementing this, not a single student has been rejected by a partner for having grades that were too low.

Funding

• Macquarie University funds all types of outbound experiences. Monash University has also been a long term provider of generous funding.

• Some institutions set aside additional funding for their special program initiatives: e.g. the BUILD program at University of Technology Sydney, The University of Queensland Advantage program and Griffith University Honours College.

• Some institutions, for example The University of Western Australia, set aside special funding for their highest academic achievers.

• At Murdoch University, students now receive $1500 of their grant up front and $500 upon return once they have actively helped promote the program.

• Flinders University has targets for gaining external scholarship funding.

• There are three universities in the ‘Two Million Dollar Club’ for outbound scholarships, with more than two million dollars allocated annually.

• Swinburne University of Technology require students who are receiving grants to contribute a few hours to helping out before going overseas, rather than after they get back.

• Some institutions accept applications for funding – both travel grants and OS-HELP – on a rolling basis.

Types of Outbound Programs: What and How?

• Deakin University has identified an international study opportunity for every degree type: an exchange, short program or other option.

• Queensland University of Technology has a pool of short term mobility funding where faculties bid for funding to develop study tours for credit. A panel then decide which projects are allocated funding.

• Students at Uni of Melbourne no longer take a leave of absence for outbound – they are enrolled in a 0 credit, $0 fees subject. They still have to complete a study plan form and pre-departure and it allows Melbourne Global Mobility to track where all of their students are.

• The University of New South Wales advertise all outbound opportunities on their blog as they become available.

• Macquarie University has a partnership with Australian Volunteers International (AVI) to facilitate international volunteering placements.

• RMIT University’s RIIERP program is a standout industry experience program, running for almost 2 decades and sending close to 2000 students on paid, industry-based experiences.

• Curtin University of Technology’s ‘Go Global’ program is a standout international clinical placement program.

Partnerships, Due Diligence, Agreements and Balances

• The University of Western Australia has a standout set of resources for their staff (both professional and academic) to consider arranging new agreements.

• University of Melbourne and University of Western Australia, now have imbalance issues in the opposite direction: they are sending out too many students on exchange.
• University of the Sunshine Coast has an innovative approach to keep their exchanges in balance: not all partners are offered as exchange destinations each semester.

• A few institutions have created ‘inbound exchange marketing’ line items in their outbound budgets to help open up additional reciprocal outbound exchange places.

Pre-Departure

• At University of Western Sydney, the Vice Chancellor attends pre-departure and presents outbound students with a certificate.

• At Swinburne University of Technology parents are invited along and in the past it has been compulsory that everyone brings someone along with them. Their session includes role-playing incidents with both students and parents.

Promoting Programs

• The stand-out Outbound Mobility website is from the University of Melbourne’s Melbourne Global Mobility unit: www.mobility.unimelb.edu.au

• Swinburne University of Technology has one of the standout drop-in office spaces – their office is highly visible, right adjacent to the train station where huge numbers of students access the campus.

• Several universities have developed their own outbound mobility ‘brand’, complete with logos, taglines etc. Often these cover all education abroad opportunities.

• Swinburne University of Technology has marketing plans developed for UG, PG and VET students.

• University of the Sunshine Coast does videos with returned students to be used on their website and inserted into Powerpoint slides for academics.

• University of Wollongong does a targeted mail-out after exams to students who are eligible for exchange

• University of the Sunshine Coast has a billboard on the freeway not far from the university promoting outbound

• Deakin University has mapped an international experience with every course: these mobility options are to be mapped out in the handbook for all faculties.

• At Deakin University, when business / law faculty students fill out their enrolment form they now have to ‘opt out’ of a mobility option when they enrol, instead of opt in.

• RMIT University ran a successful photo competition and all the galleries on campus displayed the photos from students.

• The University of Newcastle uses its Learning Management System to extraordinary success – outbound has some 5000–6000 students that have registered on its tailored outbound mobility ‘Blackboard’ site.

• Griffith University’s ‘exCHANGE YOUR LIFE’ branding includes students contributing images and videos of themselves all around the world wearing the exchange program t-shirt.

• University of Canberra has increased applications by over 200% by implementing a thorough promotional strategy.

Re-Entry

• Australia’s stand-out student participation program is Deakin University’s Peer Advisor program. There is extensive information about this in the ‘Staffing’ section of the Guide.

• Several universities, including The University of New South Wales and University of South Australia, don’t transfer students’ grades until they have returned their program evaluation.

• Several universities, including RMIT University, Charles Sturt University and University of South Australia, involve the Careers section of their universities to help ‘teach’ students about the skills they have obtained whilst abroad.
• Swinburne University of Technology requires one of their scholarship recipients to commit to being President of their Swinmates club.
• The University of Melbourne has produced a standout Returning Student Guide and companion website.

Risk Management, Insurance and Critical Incidents
• Best practice is covering all students for insurance and monitoring where all students are and what they are doing.
• Charles Sturt University checks the DFAT rating of the country for every student going out.
• The outbound staff at University of the Sunshine Coast must complete a risk assessment activity each semester for each country that students are going to on exchange.

Strategy
• Institutions’ offerings to their highest achievers frequently include strong mobility options.
• At the University of Melbourne, mobility is represented at the highest international committee in the university – the International Engagement Advisory Group.
• The University of Melbourne has developed a comprehensive Student Mobility Policy that covers all aspects of their outbound program.
• At the University of the Sunshine Coast, key staff see outbound as making USC the ‘gateway’ to global destinations like New York, London etc.
• A few universities have (or have had in the past) staff dedicated exclusively (or at least in a large part) to the promotion of outbound mobility.

Using Technology
• Queensland University of Technology has developed a standout internal database, Student Exchange Management System (SEMS), that is fully integrated with other key systems.
• The University of Newcastle is Australia’s outstanding practice at using their LMS (based on the Blackboard platform) to manage their program.
• University of Technology Sydney’s BUILD International Leadership Program is also very successful in managing in managing a complex, multi-faceted international leadership program via their LMS.
• University of Melbourne’s online pre-departure videos and quiz is a world-class resource: http://www.safetyabroad.unimelb.edu.au/
• RMIT University’s Global Passport page is an excellent example of major institutional branding that feeds outbound mobility directly: http://www.rmit.edu.au/globalpassport
• Monash University’s Monash Passport is another: http://www.monash.edu.au/education/passport/
• Two examples of best practice in website visibility are Southern Cross University and the University of Canberra who have a link on the university’s homepage.

Working with Academics
• Monash University runs a workshop for academics interested in leading study tours that helps them make their programs compliant for OS-HELP funding.
• Monash University has a very comprehensive International Staffing and Mobility Policy available online.
• University of Technology Sydney’s International Studies degree remains the standout degree structure for integrated outbound experiences.
Section B: Strategy in Outbound Mobility
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Tools in this Section


- ‘Intercultural Effectiveness’ unit overview: The University of Melbourne

- Horizon 2020 Strategy: University of South Australia

- Blueprint 2 Beyond Strategic Intent: University of New South Wales

- Photo book for students: University of the Sunshine Coast


- Stakeholder Analysis

- Outline Strategic Plan

- Business Planning for Outbound Mobility


- The University of Melbourne Campus Review Article
1. Institutional Level Strategy

Practice and Trends in Australian Universities

- International experience is widely viewed as a desired graduate outcome
- The vast majority of universities’ strategic plans support outbound mobility. See the following examples:

**Case Study:** The University of New South Wales Uni Strategy

**Case Study:** University of South Australia Strategic Plan Excerpt

- Internationalisation strategies and plans often set specific targets for mobility and include references to specific initiatives, such as international leadership programs (e.g. University of Technology Sydney has a target of 25% mobility by 2015; Deakin University’s strategy is for 20% of students to have an international experience by 2015).
- Several institutions with highly developed mobility programs are moving to the ‘next stage’ of mobility, including curriculum integration and sophisticated strategies for increasing diversity and uptake.
- Several universities have developed specific units that help develop students’ international skills and/or intercultural preparedness.
- Targets for senior managers, such as Deans, as well as targets for faculties and schools, are increasingly common.
- There are several prominent examples of where outbound mobility is attached to key university branding: ‘UQ Advantage’, ‘RMIT Global Passport’ and the ‘Monash Passport’.
- Institutions’ offerings to their highest achievers frequently include a strong mobility offering: For example Griffith University Honours College, the Chancellor’s Scholars’ Program degrees at The University of Melbourne or the Bachelor of Philosophy at The University of Western Australia.
- At several institutions degree structures are being changed to allow more flexibility for students to study overseas.
- Support for outbound mobility at the highest level of the institution is important in generating the large numbers of outbound students – although there are examples of significant mobility programs that exist without this support.
Does your university’s strategic plan support outbound mobility?

- Yes: 91.7%
- No: 8.3%

Is international experience considered by your institution to be a desired graduate outcome?

- Yes: 74%
- No: 26%

Examples of Good Practice

- At Charles Sturt University, the International Plan sets faculty targets for outbound. The faculties then have responsibility for setting targets for individual schools and Heads of School.

- At The University of Melbourne, mobility is represented at the highest international committee in the university – the International Engagement Advisory Group – where not even the international recruiters have a seat. This demonstrates the significant importance of outbound.

- The International Recruitment and Engagement Plan at Queensland University of Technology includes a section on outbound mobility at each faculty.

- University of the Sunshine Coast sees outbound as being inseparable from international marketing: ‘Our students are our best sales people. It [Outbound mobility] is about more than just getting kids out, it’s also about return on investment’.

- ‘Developed’ and ‘Advanced’ outbound programs are looking to diversify the range of options available to students.
• University of South Australia’s Global Experience Professional Development unit (http://www.unisanet.unisa.edu.au/courses/course.asp?Course=buss1056) and the University of Melbourne’s Intercultural Effectiveness unit (https://handbook.unimelb.edu.au/view/2011/800-102). These units both create a flow of tuition fees back into sections that look after mobility (Melbourne Global Mobility, and the Global Experience Program at the Faculty of Business at University of South Australia).

• Several universities no longer have ‘committees’ related to outbound mobility, but rather have ‘advisory groups’. This removes the potential for committees to become ‘gatekeepers’ and impede the forward movement of the program.

2. Program Level Strategy and Policy

Practice and Trends in Australian Universities

• More sophisticated outbound programs are trending towards developing central ‘Student Mobility’ policies.

• Most institutions are under-utilising technology as a means of increasing efficiency – this is in part due to resourcing issues.

• Workload is a significant issue for almost all institutions. The most successful programs at managing growth have been successful at focusing on generating efficiencies in their systems, processes and technology and not getting bogged down in day-to-day issues.

• Increasing staffing is sufficient to increase mobility numbers, but it is not necessary. This is evidenced by one institution that has a staff:student ratio of 1:350+.

• Reciprocity is an issue for many institutions: for some because of insufficient students going out, but also because of insufficient students coming in at several universities.

• Some institutions are implementing ‘cost recovery’ solutions and taking a more business approach to outbound mobility.

• A small number of institutions are considering capping the number of places available as their resources are stretched thin.

• 24 universities responding to a survey have indicated that they have the following policies either developed or under-development:

<table>
<thead>
<tr>
<th>Policy</th>
<th>Already have</th>
<th>Under development</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student mobility policy</td>
<td>56.5% (13)</td>
<td>47.8% (11)</td>
<td>23</td>
</tr>
<tr>
<td>Exchange grade transfers</td>
<td>72.2% (13)</td>
<td>33.3% (6)</td>
<td>18</td>
</tr>
<tr>
<td>Exchange grade appeals</td>
<td>33.3% (3)</td>
<td>66.7% (6)</td>
<td>9</td>
</tr>
<tr>
<td>Critical incidents</td>
<td>77.3% (17)</td>
<td>27.3% (6)</td>
<td>22</td>
</tr>
<tr>
<td>Travel grants</td>
<td>80.0% (16)</td>
<td>25.0% (5)</td>
<td>20</td>
</tr>
<tr>
<td>Social media</td>
<td>81.3% (13)</td>
<td>25.0% (4)</td>
<td>16</td>
</tr>
</tbody>
</table>

Examples of Good Practice

• The University of Western Australia has mapped out what they need in terms of partners, networks, staffing and types of programs etc. in order to meet the growth they are being asked to generate.

• Deakin University has launched an impressive range of initiatives to increase mobility: from highly effective use of returned students to increasing the range of options available. Their Peer Marketing
initiative has resulted in a significant increase in numbers and ‘standing room only’ at information sessions. (See Section E: Staffing).

- The University of Melbourne has developed a comprehensive Student Mobility Policy that covers all aspects of their outbound program, see: www.mobility.unimelb.edu.au/outbound/more-info/program-guidelines.html
- The Project Curriculum Integration at the University of Melbourne includes a symposium, discipline-specific information for students, and other ways to try to make mobility more accessible as part of the curriculum.
- At the University of the Sunshine Coast, key staff see outbound as making USC the gateway to global destinations like New York, London etc.

3. Key Performance Indicators and Targets

Key Performance Indicators (KPIs) and targets are important in guiding strategic direction. They allow institutions and individuals to plot where they want to get to, and to monitor their progress.

KPIs and targets can be formal or informal (i.e. part or not part of a formal review, incentivised or not). However, KPIs and targets should always be recorded in a plan so that progress can be monitored.

What Sorts of Things are Set as KPIs?

KPIs and targets most often relate to ‘increases’ – namely the number of students participating and number of programs (both quantity and diversity) on offer.

Importantly, around 60% of institutions have indicated that they also have a target / KPI around increasing efficiency or implementing new systems.

Chart: 25 responding institutions reported what KPIs they have set
Who has KPIs and Targets?

- Approximately half of the 25 institutions responding to a survey indicated that Senior Management have either KPIs or targets related to mobility.
- The same survey shows that about one third of institutions set targets or KPIs for Deans, whilst about 80% of responding institutions indicate that International Office management are given targets/KPIs.

4. Developing an Outbound Mobility Strategic Plan

This section addresses:

- Why outbound mobility needs a strategic plan
- How to prepare a strategic plan
- Business planning as part of outbound mobility strategic planning
- Identifying stakeholders.

4.1 Why Outbound Mobility Needs a Strategic Plan

Outbound mobility, like other aspects of institutional activity, has institutional benefits, brand implications, effects on students and staff, and opportunities and risks that need to be accounted for. A strategic plan supported by an operational or project plan enables you to manage resources and inputs.

Table: Rationale for an Outbound Mobility Strategic Plan

| Institutional Benefits | • Expansion of international engagement  
| | • Better graduate outcomes  
| | • Additional opportunities for staff  
| | • Opportunities to win projects and funding  
| Brand Implications | • A more ‘internationalised’ institution – committed to more than just inbound mobility  
| | • More highly skilled graduates – positive for employers of graduates, more attractive for potential students  
| Effects on Students | • Access to greater number of opportunities  
| | • More ‘soft skills’, such as intercultural communication etc.  
| | • More positive experience at the university  
| Effects on Staff | • Opportunity to engage in internationalisation on a more hands-on basis  
| | • Professional development opportunities  
| Opportunities | • Funding and scholarship opportunities  
| Potential Risks | • Critical incidents  

An outbound mobility strategic plan will help guide mobility programs that are even in their early stages of development.
4.2 Preparing your Strategic Plan

The attached template has been designed to help with strategic planning for outbound mobility. Given that every institution has a different approach to planning, this is a shell template that can be adapted to your needs.

The basic elements to the plan include understanding:

1. Your current position as it relates to outbound mobility
2. The desired future position as it relates to outbound mobility
3. How to get there
4. How to know you are there.

4.3 Business Planning as Part of Outbound Mobility Strategic Planning

Aspects of business planning can be applied when developing an outbound mobility strategic plan. You should consider some of these factors as part of your Strategic Plan to help maximise the impact of your outbound mobility program.

(Download this table as a Reference Tool below)

<table>
<thead>
<tr>
<th>Key Participants and Stakeholders</th>
<th>Identify your key stakeholders and how they might perceive and become engaged with your outbound mobility initiatives. External stakeholders might be able to provide contacts, support, sponsorship or publicity for projects. Internal stakeholders might provide support, contacts, enthusiasm or ideas.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget and Funding</td>
<td>The headline budget for your program is critical. In this section you can identify the costs of running your outbound mobility program (or specific projects) and opportunities, such as Government funding, that are available to fund projects.</td>
</tr>
<tr>
<td>Revenue Streams</td>
<td>This section allows you to consider if institutional funding is the only funding you are relying on or if there are alternative sources of incomes such as: Government funding / projects, cost-recovery from participants, or funding from stakeholders, such as an industry partner.</td>
</tr>
<tr>
<td>Goals and Objectives</td>
<td>Enter all your goals and objectives, along with a timeline for when you hope to achieve them.</td>
</tr>
</tbody>
</table>
### Market and Competition

This section may not seem intuitively linked to outbound mobility but completing it has benefits.

**Market:** Understanding what groups of existing and potential students might be attracted to your mobility program will help you identify outbound mobility opportunities that will have the greatest impact for your institution.

**Competition:** An analysis of what competing universities are doing in terms of outbound mobility will help you to refine your message to both internal and external stakeholders. For example, if a competing institution is running a business study tour to China, you might choose to run a study tour to Malaysia and highlight the benefits of your destination – different destinations will always attract different student interest.

### Potential Investors

Do not underestimate the potential of attracting sponsorship and funding from external stakeholders. As part of this section you might consider what companies, NGOs and foreign-government bodies might be interested in, so as to entice them to invest in your mobility program. As always, think about what the benefits are for them if they choose to invest in your program (such as by providing scholarships) – external organisations probably aren’t interested if the mobility program is going to improve your brand awareness, but might be interested in having a student who has returned from overseas come do an internship with them. Think ‘Win-win’.

### Legal Requirements and Considerations

What are the legal frameworks that you must comply with?

What are the legal responsibilities and risks that your program might be faced with?

Who do you need to communicate with in order to ensure the legal side of your program has been verified?

### Intellectual Property

Are there Intellectual Property considerations that need to be taken into account?

Who owns the Intellectual Property for your program/s? Is it you? Is it a partner organisation?

### Insurance, Other Risks and Management

Consideration of insurance requirement, project risks and contingency is good business planning practice and an essential part of any mobility strategic plan.
A SWOT analysis is an essential part of any business plan and, whilst it might not seem to have a place in outbound mobility planning, you will find it an interesting activity to complete!

Complete the below table by adding dot points about your program (or your ideas for the program). Use the points to play to your strengths, capitalise on opportunities and mitigate against threats and weaknesses. This is an excellent activity to complete on an annual basis.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Weaknesses</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4.4 Identifying Stakeholders

A stakeholder analysis can help you identify key people, groups and organisations that may impact (both positively and negatively) on your outbound mobility activities.

This analysis will also help you to develop targeted strategies to ensure you get the most effective support or input from these people and avoid or reduce obstacles they may impose to the success of your activities.

Potential Outbound Mobility Stakeholders

The following is a list of potential outbound mobility stakeholders for Australian universities.

Outbound Mobility Stakeholders

<table>
<thead>
<tr>
<th>Internal</th>
<th>External</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Current Students</td>
<td>• Local industry</td>
</tr>
<tr>
<td>• Outbound Mobility Staff</td>
<td>• International industry</td>
</tr>
<tr>
<td>• Other International Office Staff</td>
<td>• Language training partners</td>
</tr>
<tr>
<td>• Academics</td>
<td>• Volunteer organisations</td>
</tr>
<tr>
<td>• Senior Executives</td>
<td>• Service providers</td>
</tr>
<tr>
<td>• Professional Staff</td>
<td>• Students’ parents</td>
</tr>
<tr>
<td>• Domestic Marketing</td>
<td>• Media</td>
</tr>
<tr>
<td>• Careers Sections</td>
<td>• Parents</td>
</tr>
<tr>
<td>• Legal / Finance Sections</td>
<td>• Prospective Students: High School, vocational-level</td>
</tr>
<tr>
<td>• Project Teams</td>
<td>students, international students</td>
</tr>
<tr>
<td></td>
<td>• Partner Universities</td>
</tr>
<tr>
<td></td>
<td>• Government: State and Federal – DIISRTE / Austrade /</td>
</tr>
<tr>
<td></td>
<td>DFAT / AUSAID</td>
</tr>
<tr>
<td></td>
<td>• Service and Third Party Providers</td>
</tr>
<tr>
<td></td>
<td>• Agents</td>
</tr>
<tr>
<td></td>
<td>• Consular Bodies</td>
</tr>
<tr>
<td></td>
<td>• Peak Bodies: Universities Australia, International</td>
</tr>
<tr>
<td></td>
<td>Education Association of Australia, Australian</td>
</tr>
<tr>
<td></td>
<td>Universities International Directors’ Forum, ISANA</td>
</tr>
<tr>
<td></td>
<td>International Education Association</td>
</tr>
<tr>
<td></td>
<td>• Industry and Accrediting Bodies</td>
</tr>
<tr>
<td></td>
<td>• International Peak bodies: NAFSA, EAIE, Forum EA</td>
</tr>
<tr>
<td></td>
<td>• International Quasi-Govt: UMAP, UNESCO, UN</td>
</tr>
</tbody>
</table>
Stakeholder Interaction

The level of support received from stakeholders can often determine how successful mobility programs and projects end up being.

Here is a useful tool to analyse and work with your stakeholders:

Diagnostic Tool: Stakeholder Analysis

Related Sections:
- Working with Campus Stakeholders

Additional Related Resources:

Case Study: Campus Review Article on University of Melbourne’s Global Mobility
Outbound Mobility Best Practice Guide for Australian Universities

Section C:
Budgets and Finance

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas
What’s in this Section?

This section briefly addresses developing a general outbound mobility budget. Some statistics on practices and trends are also included.

Practice and Trends in Australian Institutions

1. Developing General Outbound Mobility Budgets
2. Developing Budgets for Specific Outbound Projects

Practice and Trends in Australian Institutions

- Approximately three quarters of 24 institutions responding to a survey indicated that they have a specific budget for outbound mobility i.e. mobility is not reliant on other areas.
- 20 universities reported a total of $1,129,000 of outbound mobility budget, excluding staffing and excluding travel grants: an average of $56,450 per university with a median allocation of $35,000.
- Strong anecdotal evidence is that institutions are underspending on key efficiency-generating resources, particularly databases and student-management systems.
- One institution has quantified the amount of time lost through avoidable data entry in an effort to get funding support for a technological solution.
- A small number of institutions are creating dedicated ‘inbound exchange marketing’ line items in their outbound budgets. This money goes towards targeted marketing to attract more inbound exchange students – a step necessary to open up additional reciprocal outbound exchange places.

Do you have a specific budget for outbound mobility?

- Yes: 73%
- No: 27%
1. Developing General Outbound Mobility Budgets

Student mobility budgets vary greatly from institution to institution. Below are a few tools to support the development of a specific outbound-mobility budget.

**Template: Outbound Mobility Budget**

General budget line items for an outbound mobility program are listed below.

- General Salaries and oncosts
- Casual Salaries and oncosts
- Consultants
- Advertising and promotion
- Freight and postage
- Stationery
- Phones and communication
- Catering
- Entertainment
- Subscriptions
- Graphic Design and printing
- Gifts (for partners)
- IT development and maintenance
- Conference registrations
- Domestic travel expenses
- International travel expenses

**Checklist: Key Line Items for Mobility Budgets**

2. Developing Budgets for Specific Outbound Projects

The Best Practice Guide section on Establishing New Outbound Mobility Projects contains extensive information about developing budgets, and taking into account various financial considerations, when establishing outbound mobility projects.

Outbound mobility ‘projects’ refers to individual projects such as study tours, group participation events (like moots or conferences), or other stand-alone opportunities.
Outbound Mobility Best Practice Guide for Australian Universities

Section D:
Outbound Mobility Planning

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas
What’s in this Section?

This section contains information about planning for outbound mobility activities, as well as examples of practice from around Australia.

1. The Importance of Planning ................................................................. D:1
2. Planning as Capacity Building ............................................................. D:1
3. Examples of Practice ................................................................. D:2

Related Sections:

- Section B: Strategy in Outbound Mobility
- Section N: Establishing New Mobility Projects
- Section E: Staffing

1. The Importance of Planning

Outbound mobility is incredibly resource intensive to manage – the average exchanges caseload is in the order of 110 exchanges (combined in/out) per advisor per year. Often resources are limited and staff time is at a premium, meaning that having clear goals to focus on, and a ‘map’ of how to achieve those goals, is critical.

Planning generally falls into one of two categories: big picture planning and recurrent planning.

Big picture planning typically covers setting strategic direction and usually occurs over a timescale of one year or longer. See Outbound Mobility Strategy in Section B.

Recurrent planning takes place over a shorter timescale of week to months. Typically it breaks larger targets and goals into more operational ‘chunks’. Recurrent planning is often manifested in the form of things like ‘weekly catch-ups’ or similar forums, where progress towards goals and targets is monitored and feedback provided.

Types of planning activities that universities undertake for outbound mobility:

- Strategic plans
- Goals and targets
- Partner development plans
- Marketing / Promotion plans
- Student management plans
- Communications / Stakeholder engagement plan
- Multi-campus plan
- Service delivery plan.

2. Planning as Capacity Building

Section E on Staffing / Focusing on Generating Efficiencies talks about the importance of setting aside time to work on tasks that are ‘Important but Not Urgent’.

Planning activities frequently fall into this category.

‘Important but Not Urgent’ tasks are often the key to building capacity, hence planning is equally an important capacity-building activity.
3. Examples of Practice

- Griffith University undertakes annual planning where they set goals, do team building, set numbers, talk about program support for students, promotional strategies, work on procedures, and develop an ‘Action sheet’ for what people want to do. They follow up 6 months later to track progress against those goals.

**Case Study: Griffith University Planning Day**

- The University of Melbourne has a program development plan and partnerships strategy, amongst others. These are all being brought together under a central Student Mobility Plan over the coming months. With the enormous size of their outbound exchanges, balance management is a huge factor, so there are strategies being developed to assist with this.
- Edith Cowan University does a brainstorming session with faculties and is working on a 3 year mobility plan.
- Flinders University has fortnightly meetings to talk about what it is currently working on.
- University of South Australia has fortnightly team meetings and time devoted specifically for student mobility where they look at things like: criteria for acceptance and funding; marketing activities for the year; travel for the year; exchange fair; staffing impact – are there absences coming up etc. In addition there is also an International Office planning day.
- University of the Sunshine Coast has a meeting three times per year to decide which partners it will be promoting and offering as exchange destinations each semester. As a way to balance agreements, not every partner is offered every semester.
- Murdoch University has a planning day where each team from the international office presents on what it wants to achieve.
- The Australian National University reviews its activities after each semester, does an annual planning day as a unit plus a planning day as a division.
- Curtin University of Technology have a Senior Managers retreat where aspects of outbound mobility are considered.
- Deakin University does a lot of data analysis. The university collects as much information as it can, such as withdrawal rates and reasons, investigations of the student experience etc. The university does several major planning sessions to map out all the things it wants to do and achieve.
- The University of Western Australia undertakes a planning day once per year at program level. The university is also focusing on trying to get regional recruitment managers to know more about the exchange partners in their region – outbound is of sufficient importance to be considered during international marketing strategy planning each year, which generates a genuinely holistic approach to internationalisation.
- Southern Cross University has a one-day debrief and planning session at the end of the year and also meets every week to talk about what is going on in terms of both inbound and outbound numbers. From the weekly meeting, a weekly report (in bullet point format) goes to the Director (International).
- University of Wollongong now has general targets for each faculty which incorporate short courses and ex-changes. Having the targets helps to generate awareness and buy-in, particularly in faculties where mobility is less common.
Macquarie University’s outbound team do planning once or twice per year as well as having fortnightly meetings to catch up on progress.

Charles Sturt University undertake its annual planning activities in January, including setting targets. Every week the outbound team looks at spreadsheets and discusses how they are tracking towards their goals. The team provides regular updates to Sub-Deans (International) and follows up when numbers aren’t tracking as planned. This is an example of excellent pipeline management.

University of Technology Sydney has team meetings monthly for study abroad and exchange and larger ‘Operations Meetings’ every six weeks that bring in the various sections of the International Office to share information.

The University of Canberra has a weekly catch up for both the team and the International Office. There are also more detailed catch ups monthly.

Victoria University undertakes weekly meetings and annual planning, mostly covering workload management.

Swinburne University of Technology has an excellent ‘pipeline’ management process. The International Office undertakes annual planning days to set goals for the year, with individual plans for each Unit developed after that. The mobility team meets weekly to review where applications are up to. Goals are revisited quarterly. In addition, the team has developed outbound marketing strategies for postgraduate, undergraduate and VET level students.
Outbound Mobility Best Practice Guide for Australian Universities

Section E:
Staffing and Structure

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas.

Disclaimer: Whilst it is possible to generalise about outbound mobility staffing, it is not possible to identify any single 'model' that would work for all institutions. There are examples of universities that have generated significant outbound successes using both the 'dedicated outbound staff' and 'split inbound / outbound staff' responsibility models.
1. Staff Structure, Responsibilities and Ratios ......................................................... E:2
   - Where Mobility Sits .................................................................................. E:2
   - Dedicated or Split Inbound / Outbound? .................................................. E:2
   - Staffing Levels ....................................................................................... E:4
   - Responsibilities ...................................................................................... E:4

2. Skills and Recruitment for Outbound Mobility .................................................... E:6
   - Recruiting for Outbound Mobility Roles .................................................. E:8

3. Strategies when Resources are Short ................................................................. E:8
   - 3.1 Time Management and Focusing on Generating Efficiencies .............. E:8
     - Some Examples .................................................................................... E:8
     - An Example in Practice ..................................................................... E:9
   - 3.2 Student Helpers and Interns ............................................................... E:9
     - Using Student Helpers .................................................................... E:9
   - 3.3 Deakin University’s Peer Advisor Program .................................... E:11
   - 3.4 Interns ............................................................................................. E:12

Tools and Examples in this Section

- Staff Skills Audit
- Annual Training Plan
- Example Position Description
- Conditions of Participation for Exchange Ambassador Program
- Many of Deakin University’s Peer Advisor Documents
1. Staff Structure, Responsibilities and Ratios

Where Mobility Sits

In Australia’s most developed student mobility programs, outbound mobility is centrally coordinated by an ‘Education Abroad’ unit that is housed in the International office of the university. This is not to say that all outbound activities are run through or by that unit, only that this unit attempts to have oversight of those activities. Inbound Study Abroad may or may not sit within this unit.

There is clear evidence that this centralised structure has enormous benefits such as:

- Coordinated communication with partners
- Staff with specialised skills
- Enhanced service to students (inbound and outbound)
- Better management of exchange balances
- More sophisticated risk management processes
- Greater ‘visibility’ of mobility.

The list could go on.

There are some examples of where a dedicated Education Abroad unit sits under a different university structure (i.e. not the international office), such as the Community section, or section for special student opportunities. This separation from the university’s central international activities also has its own set of positives and negatives. More data would be needed to in order for this Guide to comment further on this particular structure.

In small institutions, it is common for a staff member to have combined inbound / outbound responsibilities, as well as potentially other responsibilities such as admissions, marketing or agreement management.

Dedicated or Split Inbound / Outbound?

There are excellent examples of highly successful outbound mobility programs that have adopted both the ‘dedicated outbound staff’ model as well as the ‘split inbound / outbound’ model.

Which model works best for a particular institution seems to be influenced by internal factors.

Whilst it’s not possible to state that one model is better than the other, it is possible to consider some of the benefits and challenges of each.
<table>
<thead>
<tr>
<th>Model</th>
<th>Benefits</th>
<th>Challenges</th>
</tr>
</thead>
</table>
| Dedicated outbound staff member/s         | • Able to focus on greater range of programs – i.e. bring short term programs in-house  
                                            | • Greater level of expertise                                              | • Silo effect                                                              |
|                                           | • No ‘competing priorities’ from inbound                                 | • Potential difficulties if key staff members are absent or leave         |
|                                           | • Cyclical promotion-administration timeline allows for genuine downtime to work on processes | • More complicated for partners to know who to contact                     |
|                                           | • Single point of contact for academics and other professional staff     |                                                                           |
|                                           | • Single point of contact for students                                  |                                                                           |
|                                           | • Well placed to generate outbound economies of scale                    |                                                                           |
| Staff member/s split across inbound/outbound | • Reduced ‘silo’ effect                                                  | • Competing priorities between inbound and outbound (outbound often sidelined) |
|                                           | • Holistic view of student mobility                                     | • Competing ‘cycle’, so limited downtime to focus on capacity development  |
|                                           | • Single point of contact for partners                                  |                                                                           |
|                                           | • Better across issues with given partners                              |                                                                           |
| Staff member/s have outbound as part of their role, whilst also serving other international office functions | • Holistic view of internationalisation and mobility                      | • Many competing priorities, often with outbound being secondary to other things |
|                                           | • Able to link mobility in with other international initiatives         |                                                                           |
Staffing Levels

Each institution is unique and this Guide does not attempt to indicate what is the ideal level of staffing for any given institution. However, there are some ‘average’ figures that may be of use to institutions in calculating their required staffing levels.

The overall balance of evidence is that the staffing of student exchanges is very resource intensive. The AUADF is likely to be conducting a study of staffing in 2012.

The Table below, from a 2008 research project, shows the number of outbound mobility staff in Australian universities and where those roles ‘sit’, e.g. in the international office or with a faculty. Note that this data is now over three years old and does not attempt to show program sizes, responsibilities etc.

<table>
<thead>
<tr>
<th>Full time (85% of job or greater)</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11+</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Centrally (within the international office)</td>
<td>10.8%</td>
<td>37.8%</td>
<td>13.5%</td>
<td>18.9%</td>
<td>2.7%</td>
<td>10.8%</td>
<td>0.0%</td>
<td>2.7%</td>
<td>2.7%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>37</td>
</tr>
<tr>
<td>In faculties / departments</td>
<td>82.9%</td>
<td>8.6%</td>
<td>2.9%</td>
<td>5.7%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>35</td>
</tr>
<tr>
<td>Elsewhere in the institution</td>
<td>94.1%</td>
<td>2.9%</td>
<td>0.0%</td>
<td>2.9%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>34</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Part time (40–85% of job)</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11+</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Centrally (within the international office)</td>
<td>59.5%</td>
<td>24.3%</td>
<td>10.8%</td>
<td>2.7%</td>
<td>2.7%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>37</td>
</tr>
<tr>
<td>In faculties / departments</td>
<td>86.1%</td>
<td>2.8%</td>
<td>0.0%</td>
<td>8.3%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>2.8%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>36</td>
</tr>
<tr>
<td>Elsewhere in the institution</td>
<td>94.1%</td>
<td>2.9%</td>
<td>2.9%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>34</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Small role (15–40% of job)</th>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11+</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Centrally (within the international office)</td>
<td>62.1%</td>
<td>25.7%</td>
<td>5.7%</td>
<td>5.7%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>35</td>
<td></td>
</tr>
<tr>
<td>In faculties / departments</td>
<td>32.4%</td>
<td>13.5%</td>
<td>2.7%</td>
<td>10.8%</td>
<td>10.8%</td>
<td>2.7%</td>
<td>5.4%</td>
<td>0.0%</td>
<td>5.4%</td>
<td>2.7%</td>
<td>8.1%</td>
<td>5.4%</td>
<td>37</td>
</tr>
<tr>
<td>Elsewhere in the institution</td>
<td>67.6%</td>
<td>11.8%</td>
<td>5.9%</td>
<td>8.8%</td>
<td>2.9%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>2.9%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>34</td>
</tr>
</tbody>
</table>

Job position (HEW) levels vary widely amongst institutions and it is not possible from the data collected for this Guide to generalise on this topic.

Responsibilities

Outbound student mobility involves different types of overseas study programs, from exchanges, to short programs, to practical clinical and internship opportunities.

These different types of programs involve distinct management processes and timelines. They involve varying parts of universities, with some programs requiring more or less interaction with academics.

The major responsibilities for outbound mobility are managed or co-managed by several sections of institutions. The major responsibilities of the various sections of institutions are:
Two surveys (2008 and 2011) of Australian universities address where certain outbound mobility functions are managed. See the tables below.

**2011 survey:**

<table>
<thead>
<tr>
<th>Function</th>
<th>International Office</th>
<th>Faculties / Departments</th>
<th>Other administration section</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing the program</td>
<td>95.8% (23)</td>
<td>33.3% (8)</td>
<td>16.7% (4)</td>
<td>24</td>
</tr>
<tr>
<td>Managing outbound exchange applications</td>
<td>95.8% (23)</td>
<td>8.3% (2)</td>
<td>4.2% (1)</td>
<td>24</td>
</tr>
<tr>
<td>Enrolling students in ‘exchange’ units</td>
<td>43.5% (10)</td>
<td>43.5% (10)</td>
<td>34.8% (8)</td>
<td>23</td>
</tr>
<tr>
<td>OS-HELP</td>
<td>70.8% (17)</td>
<td>4.2% (1)</td>
<td>54.2% (13)</td>
<td>24</td>
</tr>
<tr>
<td>Australian government funded exchange programs</td>
<td>95.8% (23)</td>
<td>12.5% (3)</td>
<td>4.2% (1)</td>
<td>24</td>
</tr>
<tr>
<td>Managing any other travel grants</td>
<td>87.5% (21)</td>
<td>12.5% (3)</td>
<td>29.2% (7)</td>
<td>24</td>
</tr>
<tr>
<td>Travel insurance</td>
<td>47.6% (10)</td>
<td>0.0% (0)</td>
<td>66.7% (14)</td>
<td>21</td>
</tr>
<tr>
<td>Credit approvals</td>
<td>25.0% (6)</td>
<td>91.7% (22)</td>
<td>8.3% (2)</td>
<td>24</td>
</tr>
<tr>
<td>Final credit transfer</td>
<td>33.3% (6)</td>
<td>75.0% (18)</td>
<td>20.8% (5)</td>
<td>24</td>
</tr>
<tr>
<td>Study tours</td>
<td>36.4% (8)</td>
<td>86.4% (19)</td>
<td>0.0% (0)</td>
<td>22</td>
</tr>
<tr>
<td>Internships / Clinical placements</td>
<td>30.4% (7)</td>
<td>100.0% (23)</td>
<td>13.0% (3)</td>
<td>23</td>
</tr>
</tbody>
</table>

**2008: (Outbound Mobility research report)**

<table>
<thead>
<tr>
<th>Function</th>
<th>International Office</th>
<th>Faculties / Departments</th>
<th>Other administration section</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing the program</td>
<td>94.7% (36)</td>
<td>55.3% (21)</td>
<td>10.5% (4)</td>
<td>38</td>
</tr>
<tr>
<td>Managing outbound exchange applications</td>
<td>94.7% (36)</td>
<td>21.1% (8)</td>
<td>5.3% (2)</td>
<td>38</td>
</tr>
<tr>
<td>Enrolling students in ‘exchange’ units</td>
<td>50.0% (19)</td>
<td>31.6% (12)</td>
<td>34.2% (13)</td>
<td>38</td>
</tr>
<tr>
<td>OS-HELP</td>
<td>68.4% (26)</td>
<td>2.6% (1)</td>
<td>55.3% (21)</td>
<td>38</td>
</tr>
<tr>
<td>Australian government funded exchange programs</td>
<td>89.5% (34)</td>
<td>15.8% (6)</td>
<td>15.8% (6)</td>
<td>38</td>
</tr>
<tr>
<td>Managing any other travel grants</td>
<td>73.7% (28)</td>
<td>21.1% (8)</td>
<td>21.1% (8)</td>
<td>38</td>
</tr>
<tr>
<td>Travel insurance</td>
<td>50.0% (19)</td>
<td>5.3% (2)</td>
<td>68.4% (26)</td>
<td>38</td>
</tr>
<tr>
<td>Credit approvals</td>
<td>42.1% (16)</td>
<td>89.5% (34)</td>
<td>7.9% (3)</td>
<td>38</td>
</tr>
<tr>
<td>Final credit transfer</td>
<td>42.1% (16)</td>
<td>71.1% (27)</td>
<td>31.6% (12)</td>
<td>38</td>
</tr>
</tbody>
</table>
A 2008 study found that exchange is managed almost exclusively by international offices and the vast majority of full time staff committed to outbound mobility are found in international offices – institutions typically have between 1 and 3 staff working full time on mobility centrally.

Faculties are much more hands-on when it comes to alternate mobility options such as short term programs, with 80% of these programs involving faculty in some way. Other activities such as research, clinical and practical placements are almost exclusively in the domain of faculty management.

Many faculties around Australia have a staff member, not necessarily an academic, responsible for international engagement. Whilst these roles tend to focus on tasks like international student advising, marketing, agreements or research engagement, these faculty ‘international’ roles can be powerful allies for outbound mobility programs.

A few universities have (or have had in the past) staff dedicated exclusively (or at least in a large part) to the promotion of outbound mobility. Examples are Swinburne University of Technology, The University of Western Australia and Charles Sturt University, to name a few.

These roles include things such as initial advising of students, promotional campaigns, staffing student mobility front counters, running ‘buddy’ programs, publications, Facebook, collecting testimonials etc. Evidence suggests these roles are a powerful way of raising awareness about outbound opportunities and increasing uptake.

### 2. Skills and Recruitment for Outbound Mobility

Several universities have observed that the demand for outbound (or split inbound/outbound) mobility jobs is increasing. This is a reflection of the increasing professionalisation of the sector.

Some of the essential criteria for mobility staff are:

- **Cross-cultural understanding and ability** (particularly the ability to discuss issues about going overseas with students)
- **Strong administrative and customer relations skills**
- **Strong multi-tasking ability** – outbound mobility requires staff members to establish, promote and administer programs and projects, as well as deal with students who may need a high level of support whilst preparing for their overseas experience

Over time, dedicated outbound mobility staff develop specialised skills to assist students participating in overseas opportunities, as well as skills to administer those opportunities.

Some of these skills, whilst they can be learned on the job, can be sped up through specific training.

- **Cross-cultural understanding**
  
  There are a plethora of workshops available on cross-cultural understanding that are run in many locations around Australia. Depending on the background of the staff member, these cross-cultural workshops are pitched at different levels and on different topics around cross-cultural understanding, allowing staff to target areas they would specifically like to improve.

  Investigate which internal university staff might be from particular countries where you are initialising outbound projects – they can provide invaluable skills, insights and experience.

- **Outbound mobility workshops and forums**

  The International Education Association of Australia (IEAA) runs specific outbound mobility workshops several times per year. These workshops cover topics such as Critical Incident Management; Short term program development; Strategic Planning in Outbound Mobility; and Ethics and Policy Development in Outbound Mobility.

  In addition, IEAA also run an outbound mobility forum annually around March/April.

  For more information, or to join IEAA, go to [www.ieaa.org.au](http://www.ieaa.org.au)
The organisation coordinates a national Student Mobility Special Interest Group, which includes a listserv discussion email. It is free to join the email list – you need to create a profile on [www.ieaa.org.au](http://www.ieaa.org.au) in order to do so.

- **Critical Incident Response Training**
  A number of organisations provide training on responding to critical Incidents. The ISANA International Education Association ([www.isana.org.au](http://www.isana.org.au)) runs a workshop in this area on a regular basis.

- **Time management and dealing with difficult students (conflict management)**
  Up skilling in both of these areas is extremely useful for outbound mobility staff. The associations listed above occasionally run workshops in these areas – alternatively, a wide range of companies also provide training courses covering the topics.

- **Staff travel as professional development**
  Staff travel to visit overseas partners or lead/participate on projects should always be viewed as a privileged professional development opportunity, not a right.

  Staff members might not realise the true cost of this experience to their institution.

  Consider the following example of a junior staff member attending part of a program in Asia, followed by undertaking some partner visits:

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfares</td>
<td>$1500 long haul flight plus $500 of intra-regional flights</td>
<td>2000</td>
</tr>
<tr>
<td>Accommodation</td>
<td>14 nights at $100 / night</td>
<td>1400</td>
</tr>
<tr>
<td>Travel Expenses/Allowance and all incidents</td>
<td>$140 / day</td>
<td>1960</td>
</tr>
<tr>
<td>Lost staff time in office</td>
<td>$200 / working day</td>
<td>2000</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td><strong>7360</strong></td>
</tr>
</tbody>
</table>

  Even with these conservative cost estimates, to a nearby destination, we can see that this is a huge investment by universities in their staff. As budgets continue to be strained as a result of growth, it is likely that senior management will increasingly ask for evidence of the return on that investment.

  An annual training plan for staff is a valuable resource. See the template below from the US Department of Energy – this could be readily adapted for an outbound mobility program. You might also choose to do a Staff Skills Audit.

  **Template:** Annual Training Plan

  **Template:** Staff Skills Audit
Recruiting for Outbound Mobility Roles

Here you can find a very broad template of a position description for a specialised outbound mobility role:

**Template:** Position Description

3. Strategies when Resources are Short

3.1 Time Management and Focusing on Generating Efficiencies

Many universities comment that they are under-resourced for running their outbound mobility programs. This scenario calls for the implementation of efficiency measures in order to advance programs.

Many efficiencies can be gained through the use of technology (See Section F) but there are also efficiencies to be generated from a staffing perspective.

<table>
<thead>
<tr>
<th>Important</th>
<th>Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urgent</td>
<td>X</td>
</tr>
<tr>
<td>Not Urgent</td>
<td>✓</td>
</tr>
</tbody>
</table>

*From ‘The Seven Habits of Highly Effective People’, Stephen Covey*

With time management, it is easy to get drawn into perpetually taking care of ‘Urgent’ tasks, regardless of whether they are ‘Important’ or not.

**Some Examples**

**Urgent, Not Important:**
A student knocks on the door to ask questions about how to apply for an exchange program. A staff member needs to take action immediately. To decline to take action (e.g. sending the student away) may have consequences (i.e. poor customer service).

**Urgent, Important:**
A manager asks for a critical set of figures for a meeting with the Vice Chancellor. For these sorts of tasks almost everything gets put aside immediately.

**Not Important, Not Urgent:**
There are plenty of tasks that are Not Important and Not Urgent in the grand scheme of things – e.g. answering student questions where the information is available on a website, or non-work tasks like catching up with colleagues for a social chat.

In time management, many people end up working on the tasks that are ‘Urgent’ (regardless of importance), or spending too much time doing things that are Not Important and Not Urgent.
In time management, the key area to devote time to is on tasks that are ‘Not Urgent’ but ‘Important’. These are things like:

- Developing a new policy to improve service delivery
- Setting up a ‘student visitation hours’ systems
- Improving the outbound website
- Streamlining application and acceptance processes
- Doing a ‘Gaps’ analysis to work out where more program options are needed.

The list could go on and on.

These are the tasks that increase the capacity of an outbound program – the capacity to manage more students, the capacity to deliver better service, the capacity to report better etc.

At no cost, universities can instantly increase the capacity of their outbound programs by deliberately scheduling time every week to work on capacity-building ‘Important but Not Urgent’ tasks.

In the short term, staff will go through a transition of feeling a little ‘out of control’ of tasks that are ‘Urgent but Not Important’. However, as new efficiency measures are implemented, this will be reduced.

**An Example in Practice**

A university’s outbound team is constantly overwhelmed by student enquiries, both in the form of drop in visits and huge numbers of emails.

To overcome this, the team decides to write a comprehensive FAQ and film an ‘About Exchange’ video for the website that answers all of the major questions that they are asked on an ongoing basis.

They also decide to implement a ‘Student Appointment’ system, rather than students being able to drop in at any time, and to set up a recurring ‘Introduction to Exchange’ information session that all students must attend before booking an appointment. This includes setting up an online Appointment Booking system, like Tungle.Me ([www.tungle.me](http://www.tungle.me)), and creating the content and delivering the session.

Initially, the institution sets aside two hours per week to work on developing these systems. Initially, this impacts on response times to emails and customer service declines slightly because students cannot drop in at any time.

However, once fully implemented, the team significantly reduce their volume of emails and student drop-ins. Information and communication improves, as does response time and customer service. The team have generated a huge efficiency by dedicating time to an ‘Important but Not Urgent’ task.

Clearly there could be literally hundreds of examples similar to this.

### 3.2 Student Helpers and Interns

When resources are tight, adding extra staff members or getting in casual help is unlikely. Continuing on with the concept of working on ‘Important but Not Urgent’ tasks is developing a systematic approach to using students and interns.

**Using Student Helpers**

Most universities use returned students at information sessions, exchange fairs, pre-departure or in other minor ways.

Institutions that offer travel grants to students frequently have a ‘requirement’ that students help out in some way when they return from their overseas experience. Australia-wide, most institutions indicate that they actually see this as a ‘soft requirement’ or only enforce it on an ad hoc basis. Many also indicate that returned students are often recalcitrant in helping.

Clearly, this is an area where there are enormous efficiencies to be generated. Students can undertake key tasks such as: promotion, initial advising (with appropriate training), buddying up with prospective outbound students and even undertaking simple office tasks like filing, photocopying or project work.
The key to using students is to have a highly structured set of tasks for them to do (preferably tasks that can be repeated, like class presentations or filing), as well as appropriate training and supervision. Spending ‘Important but Not Urgent’ time developing these structures will pay for itself over and over again.

Tick any of the below that you use returned students to help with:

There are some excellent examples of where universities are innovative in generating buy-in from students to help out.

**Deakin University’s Peer Advisor Program**

(see 3.3 to follow)

**Swinburne University of Technology**

Scholarship recipients at Swinburne University of Technology are required to give 2 hours of service to the outbound program BEFORE they go. If they fail to do so, they don’t get their grants. Tasks these students undertake include: photocopying, putting up posters, handing out postcards, or projects like reviewing eligibility requirements. The mobility team create a list of tasks they need done and then allocate specific students to complete specific tasks.

**Murdoch University**

Murdoch University are trialling a system whereby students receiving a $2000 travel grant only receive $1500 upfront. The remaining $500 is provided to students once they have returned to Australia and have undertaken their ‘service’ to the outbound program.

**Policy: Conditions of Participation**
Queensland University of Technology

Queensland University of Technology has just started an Exchange Ambassador program with 9 students. These students help with QUT’s ‘Exchange 101’ information sessions, as well as with seminars/info sessions at O-week, inbound orientations, running campaigns, providing feedback on strategies, spending time at the information counter etc.

Queensland University of Technology had a formal breakfast to thank them and the students will also get a certificate and recommendation. A few other universities have similar programs to this.

3.3 Deakin University’s Peer Advisor Program

Australia’s stand-out student participation program is Deakin University’s Peer Advisor program.

Deakin University has invested a significant amount of time developing their program but the impact has been enormous... a 90% increase in applications, standing room only at Information Sessions, amongst other things!

After a comprehensive recruitment process (including interviews), the Peer Advisors are thoroughly trained with a three day orientation program in which they undertake training on presentations (including filming their presentations and watching them back), sales skills and public speaking.

Deakin University’s eighteen peer advisors cover varying academic disciplines and campuses. They are rostered on to undertake four hours of unpaid work per week, including: targeted lecture visits, speaking with prospective students, and extensive promotions and administration work. They are the initial contacts for students who are interested in outbound opportunities.

Students are not paid but do get to go to Korea on a study tour for 3 weeks for free at the end of the year, which is partly funded by the Korean partner and is used to address the exchange imbalance.

Read more about Deakin University’s Peer Advisor Program here:

**Case Study:** Deakin University Student Mobility Peer Advisor Program

Deakin University have also generously provided the following examples:

**Template:** Deakin University Peer Advisor Email to Apply Template

**Checklist:** Deakin University Peer Advisor Program Interview Questions

**Template:** Deakin University Peer Advisor Participation Certificate
3.4 Interns

Quite a few universities use interns, either locally or internationally recruited, to assist on their outbound mobility programs.

To be done effectively a significant amount of time must be devoted to developing a rigorous internship plan and thoroughly training the intern – with this the outcomes can be enormous. However, if this time cannot be set aside, institutions who are successfully using interns suggest that it would be more cumbersome than valuable to have an intern.

In other words, this is a classic example of a ‘Important but Not Urgent’ initiative.

At The University of Melbourne, the annual intern is drawn from the Masters of Higher Education program. The intern is supervised by the head of Melbourne Global Mobility who devises an internship project guide and constantly monitors their progress.

La Trobe University draws its annual intern from a partner in Asia – an excellent way of adding depth to the relationship with a valued partner.

The University of New South Wales draws its interns through the Careers and Employment office who provide extensive training to the students (who are usually international students) prior to their commencement.
Outbound Mobility Best Practice Guide for Australian Universities

Section F:
Using Technology

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas
What’s in this Section?

1. Use of Technology in Managing Exchange ........................................ F:2
2. IT tools for Generating Administrative Efficiencies ............................... F:3
   - Online Surveys, Applications and Evaluations ............................... F:3
   - Skype .................................................................................. F:4
   - Webinars .............................................................................. F:4
   - Event registrations and RSVPs .................................................... F:4
   - SMS .................................................................................... F:4
   - Databases .............................................................................. F:4
   - Learning Management Systems .................................................. F:4
   - Credit Precedence Databases / Systems ....................................... F:5
   - Effectiveness of Various Technologies .......................................... F:6
3. Examples of Innovation in Using Technology ........................................ F:6
   - Social Media .......................................................................... F:7
4. Outbound Exchange Websites ............................................................... F:8
   - Control of Websites .................................................................. F:8
   - Entry Point for Websites .......................................................... F:8
   - The Best Website? .................................................................... F:8
   - Information Listed on Websites .................................................. F:9

Additional Related Resources ................................................................. F:10

Tools in this Section

- Student Exchange Management System (SEMS)
- Example of an Internal LMS Site for Mobility
- Getting the Website Right
- Moveon
- Online Pre-Departure: http://www.safetyabroad.unimelb.edu.au/
- Prospective Students page
- Social Media Guidelines
- Overseas Activity Notification Form
1. Use of Technology in Managing Exchange

Approximately half of universities still manage all of their outbound mobility using spreadsheets. This includes some very large mobility programs. The vast majority of these institutions have expressed their desire for a more sophisticated database solution.

**How do you manage applications for student exchange?**

A small number of institutions have now purchased commercial solutions (MoveOn has been the favoured solution at this point), with the remaining institutions relying on internally built databases (normally Filemaker Pro, or similar) to manage outbound mobility.

Queensland University of Technology has developed perhaps the standout internal database, Student Exchange Management System (SEMS), that links with its central student administration system. It is a fully integrated system where students apply online and can choose from active partners on the form.

**Case Study: Queensland University of Technology**  
*Student Exchange Management System*

Another excellent, internally developed system is at the University of the Sunshine Coast. Their filemaker database can be accessed on an iPad and displays instantly exchange balances with certain partners – invaluable for staff on the road.

Several universities use the Student1 (or Student2) central student systems. Several institutions have indicated that there is a module available that can be tweaked then used for mobility – this is the ‘Rewards’ module and it can be used for applications and link to things like OS-HELP and enrolments.

See also *Learning Management Systems*. 
Do you have an online application form for outbound mobility programs?

![Bar chart showing the number of institutions with online application forms for outbound mobility programs.](image)

The number of institutions with an online application for outbound mobility should shortly overtake the number that do not (note: not all institutions responded to the survey). Institutions could quickly overcome this by using a cheap online survey tool like SurveyMonkey (www.surveymonkey.com).

2. IT Tools for Generating Administrative Efficiencies

Benchmarking shows that outbound mobility programs are resource intensive to manage. Yet one institution has a staff:student ratio of 1:400 whilst another has 1:50. Why?

Of course there are many factors at play, but one of the key areas is around the use of technology. Many institutions lose extraordinary amounts of time to data entry (one institution has even managed to quantify this: 1.2 staff members at HEW4 per year!).

Using IT systems or online tools can generate excellent efficiencies – anything that can be done in bulk, or automated, saves time!

### Online Surveys, Applications and Evaluations

SurveyMonkey (www.surveymonkey.com) is a powerful online tool that can be used to generate and distribute online forms such as surveys, applications and evaluations. Universities using paper-based applications and evaluations should strongly consider switching to an online system, which saves huge amounts of paperwork for a negligible annual fee (a few hundred dollars).

SurveyMonkey has a limited-features free service as well as an inexpensive subscription service that opens up all the functionality of the platform. Organisations, regardless of their size, have generated significant efficiencies just by switching from paper-based forms to SurveyMonkey.

The University of Newcastle uses SurveyMonkey to great effect. Here is an example of one of their online forms:

---

**Template:** The University of Newcastle  
Notification of Overseas Activity Form
Skype

Skype is a well-known, commonly used tool for making free audio and video calls around the world. Skype is a powerful tool for connecting with partners – allowing users to ‘see’ each other as part of a conversation, thus helping partners ‘put a face to the name’ and deepen relationships. However, there is little evidence of its widespread use (or use of a similar tool) in Australian universities.

Institutions looking to deepen their relationships with targeted partners should consider planning an annual, or bi-annual, Skype call with them.

Webinars

Webinars are online seminars. These are great in terms of allowing students to participate in an activity, regardless of where they are located. Webinars can be recorded and a link then forwarded on to other people to watch the recording later.

Webinars can be used for promoting programs, running pre-departure sessions, holding meetings for program participants etc.

Several webinar platforms exist, such as Yugma (www.yugma.com) and Any Meeting (www.anymeeting.com).

Event Registrations and RSVPs

If you are running a showcase event that requires RSVPs, you might wish to consider using the online Eventbrite tool (www.eventbrite.com). Eventbrite is a powerful ticketing and web system that is free to use – it allows you to set up a website, generate and give away or sell tickets, administer and report on events.

SMS

SMS is a great way of staying in touch with participants about key aspects of their project. Online ‘Bulk SMS providers’ have systems to send out SMS to individuals and groups. It is inexpensive (a few cents per SMS sent) and people are more likely to read their SMS’ than their emails!

An inexpensive bulk SMS provider is SMS Global.

Databases

Any institution with more than a few hundred students going overseas annually should consider implementing a database. In terms of tracking students, improving communication by campus stakeholders, maintaining consistent service and increasing efficiency, there is no substitute.

If you are a larger organisation looking to develop a database, you may wish to use a free online Customer Relationship Management system. A system like Sugar CRM (www.sugarcrm.com) can be adapted relatively easily by someone who has technical database experience. It is free to use and there are many free ‘plug-ins’.

An alternative to Sugar is the ubiquitous Salesforce program. University of Western Sydney hopes to shortly move its outbound program management to this platform.

There are several specific student mobility database solutions on the market, including Moveon and StudioAbroad. Flinders University and Swinburne University of Technology are also using, or about to use, their Hobsons-built databases to manage outbound students – this is also a very powerful solution.

Several Australian institutions have recently implemented Moveon. Read Griffith University’s Case Study:
Learning Management Systems

University Learning Management Systems (LMS) are potent places to store and manage outbound mobility information.

University LMS include platforms like Moodle, Blackboard and WebCT. There are several examples of universities around Australia who have set up an outbound mobility ‘course’ on their LMS – students can enrol themselves in that ‘course’ for more information or to be guided through the student exchange process.

The most significant benefit of having outbound mobility information on your institution’s LMS is having control. Unlike updating websites, you have instant control to update and manipulate your ‘course’.

There are powerful ‘course’ features like bulletin boards, the ability to email ‘course’ participants, quiz and assessment functions, electronic drop boxes, video and audio capability….the list goes on.

The University of Newcastle is Australia’s outstanding practice at using their LMS (based on the Blackboard platform) to manage their program. Students can self-enrol in the ‘Outbound’ course and can then be target emailed specific opportunities.

The University of Newcastle has generously shared its entire LMS course structure:

University of Technology Sydney’s BUiLD International Leadership Program has also been very successful in managing a complex, multi-faceted international leadership program via their LMS. This includes giving students access to a wide range of outbound opportunities, as well as administrative and program information.

The University of Canberra is establishing a Moodle LMS outbound mobility page and has the goal of having all undergraduate students enrolled in this ‘course’. Three degree groups are already on board for a trial and if it proves successful the university will extend it to all degrees.

The University of the Sunshine Coast also actively uses its LMS-based site in preference to its publicly-facing webpage.
Credit Precedence Databases / Systems

One university has two faculties that use an online system that shows credit precedence. Whilst credit precedents aren’t always necessary, it does provide a good indication to students about credit possibilities. The flip side of this is newer partners aren’t added and reflected straight away so students don’t realise they can go there – the critical lesson in this is that systems being used should be kept up to date as much as possible, particularly in modern times where students expect immediate access to real-time information.

Effectiveness of Various Technologies

Institutions responding to the survey indicated how effective they thought the following technologies were in outbound mobility.

### How effective are the following?

- **Outbound webpage**
- **Evaluation/survey tool** e.g. SurveyMonkey
- **Skype**
- **Instant messenger program**
- **Bulk SMS system**

3. Examples of Innovation in Using Technology

There are extensive examples from around Australia of how institutions use technology to improve the attractiveness of their offering, as well as generate efficiencies.

A non-exhaustive list is below.

- The University of Melbourne’s online pre-departure videos and quiz: [http://www.safetyabroad.unimelb.edu.au/](http://www.safetyabroad.unimelb.edu.au/). This is a world-class resource.
- Queensland University of Technology’s Student Exchange Management System (SEMS) database including online application and fully integrated student management portal.
• The University of New South Wales’s use of Tungleme: [www.tungle.me](http://www.tungle.me). An online appointment booking system that synchronises with Outlook. Students book time with advisors online as part of the application process. Users can set up times when they are available. Students must have attended an information session before getting time with an advisor.

• University of Wollongong gets a few students do a blog for them each semester.

• Swinburne University of Technology uses SMS and also has a YouTube channel.

• Griffith University also has an online pre-departure and makes use of free Google services like Google docs and forms (for registrations).

• Griffith University has its exCHANGE YOUR LIFE branding, which includes students contributing images and videos of themselves all around the world wearing the Griffith exchange program t-shirt. This is all potent social media fodder.

• University of the Sunshine Coast has done three videos with returned students, each being three minutes long. These are to go on the website and also to be inserted into the Powerpoint slides that they send to academics to help promote the program. They will also eventually go up on YouTube.

• Several institutions use the TRIM electronic filing application. The University of Adelaide effectively uses TRIM to create a paperless outbound program.

• Many institutions use a generic ‘advisor’ email address e.g. studyoverseas@university.edu.au to take the pressure off individual advisors and ensure case information on particular students is commonly available. This is a simple solution that all institutions can implement.

• The University of Melbourne no longer has a leave of absence for mobility – all students are enrolled in a 0 credit point, 0 fees unit whilst they are abroad. This is ideal for monitoring and also ensures that all experiences are captured and can eventually be recorded on the Australian Higher Education Graduate Supplement (AHEGS).

• The University of Melbourne is also using Ning (a solution that allows you to set up your own social network).

• University of the Sunshine Coast also uses Tripit! to record where and when staff are travelling. This has interesting potential applications for students heading overseas.

• Deakin University has a highly coordinated approach to using Facebook [http://www.facebook.com/Deakin.StudyAbroad.Exchange?sk=wall&filter=2](http://www.facebook.com/Deakin.StudyAbroad.Exchange?sk=wall&filter=2), which includes planning out what content is going to be posted well in advance. For 6 months, they mapped out what is going up on Facebook in terms of both ‘engagement’ and ‘promotional’ information.

• Curtin University of Technology has linked its Facebook page to all its partners’ Facebook pages.

### Social Media

Several universities use students to monitor and run their Facebook pages. One of the best examples of this is Deakin University’s Peer Advisors (see **Section E Staffing**) who are thoroughly briefed and trained on their roles.

Several institutions involving Marketing and Communications teams on branding their social networks: Flinders University and University of Technology Sydney are two such examples. See [http://www.facebook.com/UTSBUILD](http://www.facebook.com/UTSBUILD).
The great challenge of social media is making it active. One institution made the observation that this may be because it is difficult to impart the feeling of being part of a ‘group’ on cohorts of students, particularly since they are travelling to lots of different places around the world.

Generally speaking, most universities seem to acknowledge the need to do more using social media but are not finding the time to do so.

4. Outbound Exchange Websites

Control of Websites

Many institutions are frustrated by their lack of control over their websites, with responsibility for updating sites often being held by other business units. Many institutions comment that they would like to have more time to revamp their sites.

Some institutions get around this issue by hosting much of their critical outbound information on their Learning Management System (see previous). For these institutions, their website is simply a mechanism to encourage students to join their outbound mobility ‘course’ on their LMS. The University of Newcastle’s website (http://www.newcastle.edu.au/students/study-abroad/) is a good example of a slimmed-down site where most program information is on the LMS.

‘Entry Point’ for Websites

Where universities’ outbound mobility pages ‘sit’ varies greatly. Often they are found under the ‘International’ pages or under ‘Current Student’ sections (which some institutions highlighted they felt was more intuitive from a user’s perspective).

Two examples of good practice might be Southern Cross University and the University of Canberra who have a link on the homepage of the university.

Several universities have managed, from time to time, to get special listings on their institution’s home page or, particularly, on the ‘Current Students’ pages. This is usually for special events and promotions, and may be in the form of a ‘tablet’ (rotating image or text) or ‘News’ item.

The Best Website?

The benchmark outbound mobility website is from the University of Melbourne:

Case Study: http://www.mobility.unimelb.edu.au/

This site is visually appealing, has comprehensive information, a simple URL and makes use of attractive web features like videos, testimonials and photos.

RMIT University’s Global Passport page is an excellent example of major institutional branding (RMIT heavily uses its ‘Global Passport’ features in its branding) that feeds outbound mobility directly:

Case Study: http://www.rmit.edu.au/globalpassport

Monash University’s Monash Passport is another excellent example of this: http://www.monash.edu.au/education/passport/
Information Listed on Websites

Information that universities put on their websites varies greatly. A checklist would include things like (in no particular order):

- Information about outbound opportunities (exchange, short programs, internships/practical placements etc) with relevant links
- Eligibility information for certain program types
- Information session dates and times (sometime signup forms too)
- Destinations for students from particular faculties (also in the form of discipline-specific advising sheets)
- List of partners with links – often sorted by region, or by suitability for particular disciplines
- How to apply
- FAQs
- Processes – particular application and enrolment processes
- Forms
- Information about credit transfer (and credit precedent in some cases)
- Advice about finances (example costs whilst abroad depending on program type), scholarships, grants and OS-HELP
- Logistics advice: like booking airfares, insurance and general visa information
- Testimonials: photos, videos, blogs and reports
- Pre-departure information, sessions and guides
- Health and Safety information
- Why go on an overseas study program?
- Information about time overseas: like re-enrolling, what to do in emergencies etc.
- Re-entry information and advice
- Contact information.

Having an alias URL (like www.university.edu.au/exchange) is essential for simpler publicity and ease-of-access.
Additional Related Resources:

Case Study: Screenshot of Wollongong’s Exchange Facebook Page

Case Study: Screenshot of the ‘Entry Point’ for Flinders University’s Mobility Website

Case Study: University of Melbourne’s Social Media Guidelines
Outbound Mobility Best Practice Guide for Australian Universities

Section G:
Funding:
Scholarships, Grants and OS-HELP

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas

Disclaimer: This section does not endeavour to provide a full breakdown of who is offering how much funding, or to offer a full review of funding management at universities around Australia. Some such information is confidential whilst other parts is picked up in AUIDF benchmarking.
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Examples of Good Practice .................................................................................. G:3
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2. Travel Grant Uses ......................................................................................... G:5
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- Conditions for Receipt of Award
- Receipt of DIISRTE Subsidy Conditions
- Hosting an Inbound Executive Award Recipient
- Travel Grant Application Form
- Travel Scholarship Policy Template
Practice and Trends in Australian Universities

- 22 universities responding to the survey declared $6.65 million in central scholarship funding, an average of $302k and a median of $162k. 9% of respondents indicated that their travel grant funding is uncapped.

- 21 universities declared $1.02 million in faculty scholarship funding, an average of $48,000 per university. The median was $10k and the range from 0 to $500k.

- A number of universities offer every student undertaking an experience a travel grant. Macquarie University has been the long term benchmark for this – offering funding for exchanges, short programs, volunteering, internships, conferences and many other international experiences. Monash University is also a long term supporter of generous funding.

- University of South Australia: Some travel grant funding is recovered from the faculties (60% from the International Office and 40% from the faculties). The International Office pays grants to students throughout the year, then asks for 40% of the funding back at the end of the year from the faculties. This was created to generate buy-in 'but has really just created work' as it doesn't involve the faculty members and just ends up being an administrative step between the International Office and the faculties.

- There is a trend in institutions simplifying their allocation rules – e.g. by region and program types, or even just setting fixed amounts based on program duration (long / short).

- Some institutions set aside additional funding for their special program initiatives: e.g. the BUiLD International Leadership program at University of Technology Sydney: www.ssu.uts.edu.au/beyonduts, UQ Advantage program: www.uq.edu.au/undergraduate/the-uq-advantage, Griffith University Honours College: www.griffith.edu.au/griffith-honours-college

Case Study: Griffith University Honours College

- Some institutions, for example The University of Western Australia, set aside special funding for their highest academic achievers (based on their WAM – Weighted Average Mark).

- At Murdoch University, students now receive $1500 of their grant upfront and $500 upon return once they have actively participated in helping to promote a program etc.

- A number of institutions, particularly those that have some form of guaranteed funding for students, have identified that a ‘sense of entitlement’ as opposed to a ‘sense of appreciation’ has become an issue for them. One such institution suggests that ‘whilst it is important to highlight that funding is guaranteed, it is imperative that it is clear to students that there is still some minimum standard that they must meet in order to obtain funding’.

- Whilst many institutions only offer grants for activities overseas that are ‘for credit’, there is a growing tendency to commit funds to experiences that are not necessarily for credit. Sometimes this is through special programs, like GLP at Macquarie University or iLEAD at The University of Newcastle, though not always.

- Where funding is limited, GPA/WAM is the most influential in determining who gets a grant. Exchanges are almost exclusively funded first where funding is limited, followed by short programs or other ‘credit bearing activities’.
Examples of Good Practice

- 9% of responding universities indicated that their travel grant funding is uncapped.
- Flinders University has targets for gaining external scholarship funding.
- Queensland University of Technology uses the same application model for its faculty to nominate for DIISRTE programs as for its regular short term program grants.
- One of Australia’s most successful outbound programs, that has little funding, was asked ‘How do you manage to facilitate so many movements without significant per-student funding?’ Their response: ‘The make up of program-types helps to minimise financial barriers to an extent, especially the short programs. There is a strong international culture at the institution and long history of mobility programs, which helps. The institution has great advisors and great champions, and with our student demographic an overseas learning experience is seen as a competitive edge’.
- Charles Sturt University has one of the best regional funding scheme in the country: the Vice Chancellor’s Travel Grant is $500 for short credit bearing activities and $1500 for long experiences. This grant is either paid to the student or taken off the price (of a short program). It is an uncapped budget.
- At The University of Newcastle, the outbound coordinator tells students who are hesitating about taking OS-HELP how much has been used (in dollar terms) in the past year and this seems to help students get through their hesitations about the loan.
- Some institutions are limiting the effectiveness of OS-HELP through their own OS-HELP policies e.g. deadlines, amounts available, application processes. Reviewing these policies in conjunction with OS-HELP guidelines and legislation is advisable.
- Queensland University of Technology has developed its online Student Exchange Management System so that travel grants can also be handled through the system, along with applications for programs.
- There are at least three universities in the ‘Two million dollar club’ for outbound scholarships.
- Deakin University, The University of Melbourne and The University of Western Australia all have excellent Equity and Access mobility funding.
- University of the Sunshine Coast has excellent funding for students: every student going on exchange gets $3000 for a semester (if they aren’t on DIISRTE funding). Students on short programs get $250 for 3 weeks or $500 for 6 weeks if they don’t get other funding.
- Swinburne University of Technology requires students who are receiving grants to contribute a few hours to helping out before going overseas, rather than after they get back.


http://www.international.mq.edu.au/scholarships/travel_grants
1. Eligibility for Funding

If your institution decides to offer travel grants or scholarships it is critical that there is a policy in place to determine which students are eligible for a grant and the criteria by which those grants are allocated.

Some criteria that you might choose to apply are:

- **Student’s point in their program**
  You might choose to require students to have completed a minimum amount of study at your institution or having a certain amount of studies remaining at the completion of their overseas experience.

- **Academic performance**
  How well the student has performed in their studies – this might be based on their results or on references from academics.

- **Extra-curricular performance / engagement**
  One of the key ways to promote your mobility program and specific projects is through referrals by previous participants. Students who are involved in external activities and organisations are often the best ambassadors for your program as they are demonstrated self-starters. Your Travel Scholarship application might ask for students to talk about the organisations and activities they are involved in outside of their studies.

- **Needs-based**
  The temptation to provide scholarships on a needs-basis is strong, but it is also complicated to verify. It is not advisable to try and ascertain need by requesting income documentation yourself, but rather to ascertain it by evidence of other support students are receiving. For example, if you do go for needs-based scholarships you might want to ask for evidence of Centrelink support or check with your Equity/Access section to see if they are aware of the student in question.

- **Background**
  You may choose to allocate a scholarship to students of a particular indigenous or ethnic background.

You can create your travel grant policy using this blank Travel Grant Policy document:

**Policy: Travel Scholarship Policy**

An example of good practice is at The University of Queensland where the criteria for scholarships are endorsed by faculty.
Who is eligible for travel grant funding? Select all that apply.

2. Travel Grant Uses

Travel grants are most commonly available for semester exchange programs, followed by short programs, practical opportunities (clinical placements and internships) and volunteering.

Many institutions differentiate between funding set aside for outbound mobility and funding set aside for research mobility (often funded separately through Research Offices). For example, The Australian National University splits its funding according to postgraduate, undergraduate and HDR.

Many institutions have specific pools of funding targeted to semester exchanges only, with other pools of money (where available) targeted towards ‘other activities’.
What are grants used for?

<table>
<thead>
<tr>
<th>Travel Grants</th>
<th>Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Semester/Year Exchange Program</td>
<td>No travel grants</td>
</tr>
<tr>
<td>Short Programs (Summer, Winter)</td>
<td>No travel grants</td>
</tr>
<tr>
<td>Practicum Placements</td>
<td>Available</td>
</tr>
<tr>
<td>Internships</td>
<td>Available</td>
</tr>
<tr>
<td>Clinical Placements</td>
<td>Available</td>
</tr>
<tr>
<td>Research Programs</td>
<td>Available</td>
</tr>
<tr>
<td>Volunteering Programs</td>
<td>Available</td>
</tr>
<tr>
<td>Conference Participation</td>
<td>Available</td>
</tr>
<tr>
<td>Conference Presentations</td>
<td>Available</td>
</tr>
<tr>
<td>No travel grants</td>
<td>No travel grants</td>
</tr>
</tbody>
</table>

Equity and Access

Quite a few universities have special funding targeted towards Equity and Access outbound mobility grants.

At The University of Western Australia, all indigenous students get an extra grant, as do students on the Commonwealth Scholarship Program (formerly the Commonwealth Learning Scholarship program) for students of indigenous or low socio-economic background. These additional grants have proven very effective.

The University of Melbourne has a number of ‘full ride’ scholarships for disadvantaged students to go overseas. Equity students first do an organised program (e.g. a short program or study tour), before being able to choose to participate on another international learning experience.

This type of engagement is part of The University of Melbourne’s philosophy of being a public spirited institution.

Outside of Group of Eight, Deakin University is one such institution that has additional equity scholarships like these.

3. Application Processes

Application Forms and Processes

There are a variety of application processes for travel grants within universities. These often vary depending on the type of program that funding is being applied for.

Some broad generalisations about application processes are:

- A significant number of universities still use paper application forms for travel grants/scholarships, which is very resource intensive. Universities in this situation should immediately consider switching to a cheap online survey tool (such as SurveyMonkey) to collect applications from students, saving significant amounts of time.
• For semester exchange programs, students are commonly considered for available scholar-
ships / grants without having to submit a separate application form once they have applied
for exchange.

• Most universities with travel grant schemes for non-exchange activities have 4–6 deadlines
per year, although at least one institution processes grants monthly. Good examples of travel
grant schemes are at the University of Melbourne and Macquarie University:
http://www.international.mq.edu.au/scholarships/travel_grants

• Some institutions accept applications for funding on a rolling basis.

Examples of Application Forms:

**Template:** RMIT University Travel Grant Application Form

**Case Study:** Swinburne University of Technology
Scholarship Application Form

**Conditions of Participation**

Most institutions require their students to sign some form of disclosure, or Conditions of Participation,
upon receiving a grant. Common inclusions in these conditions are:

• Students must act responsibly (as ambassadors)
• Students with unconscionable conduct may have to repay the grant
• Students agree to help ‘contribute’ to (e.g. promote) the mobility program upon return.
  (Swinburne University of Technology has taken the innovative approach to require students
to contribute before they participate, rather than after.)
• Clauses about under what conditions the grant will have to be repaid (e.g. if the student
withdraws)
• Conditions about travel insurance, risk management and submitting travel details/emergency
contacts.

The University of Western Australia has provided the following examples:

**Policy:** The University of Western Australia
Conditions for Receipt of Award Policy

**Policy:** The University of Western Australia
Receipt of DIISRTE Subsidy Conditions
Macquarie University has a Proof of Completion requirement, where students are required to submit documentation about their overseas experience once they return. http://www.international.mq.edu.au/goingabroad/important/proof_completion

Other institutions, like Deakin University, University of Technology Sydney, The University of Newcastle, Macquarie University and University of South Australia (amongst others) allow students to have their overseas experience ‘recognised’ as part of an institutional ‘Award’ or ‘Leadership Program’. See Types of Outbound Opportunities.

**Payment of Grants**

Grants are commonly paid as a batch on a specified date prior to students departing for their overseas experience. However, there are some interesting variations on this practice.

For exchange programs, the University of Wollongong process the travel grants once students are overseas, have enrolled at their host institution and sent back the University of Wollongong enrolment form. Students then receive their travel grant after that. For short programs, students receive their grants two weeks prior to departure.

At Charles Sturt University, students complete a funding application form when going on a short program. These can be completed anytime prior to departure and are handled as they come in.

At Murdoch University, in an effort to encourage greater returned students participation, students now get $1500 of their travel grant upfront and $500 after they get back once they have actively participated.

EFT is generally the preferred method of travel grant payment, although several universities still issue cheques.

4. **DIISRTE Funding Programs**

**International Student Exchange Program (ISEP)**

Small and regional universities are typically heavily reliant on DIISRTE’s ISEP funding for program grants.

For semester exchange funding, most institutions automatically allocate ISEP funding to eligible students without a need for further application by students. Where there is competition for a grant, average grade (GPA or WAM) and response to interview / motivation letter are main determinants. Institutions commonly use exchange-length funding to get students to traditionally non-mobile destinations or partners where significant imbalances exist.

**Study Overseas Short-term Mobility Program (STMP)**

Institutions are complimentary about the recent short term program. A number of institutions call for nominations of programming ideas from their faculties. The highest quality proposals put forward by faculties are then adopted for the university’s grant application to DIISRTE.

This application / approval mechanism increases the quality of final applications to DIISRTE and also serves to generate buy-in from faculties. For the main part, faculties are responsible for implementing a program once DIISRTE funding is received.

Queensland University of Technology uses the same process for faculties to apply to be DIISRTE short term program nominees as they do for faculties to apply to be part of the regular short term program scheme (where faculties bid for university funding for short term programs). For more information, see Types of Outbound Opportunities.
5. OS-HELP

The majority of institutions have indicated very strong growth in OS-HELP uptake since the loan fee was removed at the beginning of 2009. AUIDF benchmarking supports this feedback, indicating a significant jump from $11.3 million in funds used by institutions in 2009 to $19.1 million in 2010.

A number of institutions have had their OS-HELP allocations significantly oversubscribed and had to go back to DIISRTE for additional loans.

5.1 Deadlines

Under the OS-HELP rules, institutions need to specify application opening and closing dates to students.

- Most institutions have two fixed application deadlines per year.
- Within this group, a significant number of institutions consider OS-HELP applications outside of the ‘advertised’ periods. This is particularly for ‘groups’, such as study tours, but at least five institutions questioned manage applications on a rolling basis. Anecdotally, this increased flexibility has increased access to OS-HELP.

5.2 OS-HELP Misconceptions

Common misconceptions of OS-HELP are:

<table>
<thead>
<tr>
<th>Misconception</th>
<th>Reality</th>
</tr>
</thead>
<tbody>
<tr>
<td>It can only be paid two weeks prior to a student’s departure overseas</td>
<td>OS-HELP is not required to be paid two weeks prior to a student’s departure overseas. Providers are required to establish their own OS-HELP policy that should outline how and when OS-HELP payments will be made to selected students.</td>
</tr>
<tr>
<td>It can only be paid six weeks prior to a student’s departure</td>
<td>OS-HELP does not have to be paid six weeks prior to a student’s departure overseas. Providers are required to establish their own OS-HELP policy that should outline how and when OS-HELP payments will be made to selected students. The only reference to six weeks is in relation to student undertaking a second six-month study period that is a continuation of a first six-month study period. In this case, the provider must determine, on a date that is not more than six weeks before the commencements of the second six-month period, that the student still meets the eligibility criteria.</td>
</tr>
<tr>
<td>Short programs can only be funded pro-rata</td>
<td>Short programs do not have to be funded pro-rata. The amount of OS-HELP assistance paid to each selected student is determined by the provider in accordance with its OS-HELP policy. This amount must not:</td>
</tr>
<tr>
<td></td>
<td>• exceed the maximum OS-HELP loan amount specified by the Government;</td>
</tr>
<tr>
<td></td>
<td>• be less than the minimum OS-HELP amount, if the provider has specified a minimum amount in its OS-HELP policy; or</td>
</tr>
<tr>
<td></td>
<td>• be different to the amount indicated on the student’s completed and signed OS-HELP debt confirmation form.</td>
</tr>
<tr>
<td>Misconception</td>
<td>Reality</td>
</tr>
<tr>
<td>---------------</td>
<td>---------</td>
</tr>
<tr>
<td>Students in their honours year cannot get OS-HELP</td>
<td>Students in their honours year are eligible to receive OS-HELP. To be eligible for OS-HELP, a student must be enrolled in an undergraduate course of study with their Australian provider. Under the <em>Higher Education Support Act 2003</em>, an honours degree is considered an undergraduate course of study. Nevertheless, students in their honours year may be ineligible because to receive OS-HELP they must have completed at least one EFTSL of study as a Commonwealth supported student that counts towards their course. Where a student is undertaking an honours component of an undergraduate course of study, the entire undergraduate course may be considered for the purposes of assessing eligibility for OS-HELP. However, if a student’s honours year is considered by the provider to be a separate course of study, only the honours year can be considered when assessing eligibility.</td>
</tr>
</tbody>
</table>

The OS-HELP legislation and Guidelines give institutions significant flexibility to implement the scheme on their campuses. A number of institutions have overly restrictive OS-HELP policies, essentially self-imposed. Reviewing institutional OS-HELP policies in conjunction with the legislation and guidelines is advisable.

### 5.3 Control of Policy

A very small number of international offices have been denied input on institutional OS-HELP policy by other sections of their universities. It is critical for international offices, that deal with students at the coal face on a daily basis, to have input on institutional OS-HELP policy. These institutions are a significant minority and a lack of input clearly limits the scheme’s effectiveness.

### 5.4 How Well is OS-HELP Promoted?

The majority of institutions responding to the survey invest a significant effort to promote OS-HELP.

<table>
<thead>
<tr>
<th>Have not requested OS-HELP loans</th>
<th>Have OS-HELP, but do not promote it</th>
<th>Promote OS-HELP a little</th>
<th>Promote OS-HELP moderately</th>
<th>Promote OS-HELP extensively</th>
<th>Rating Average</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>OS-HELP</td>
<td>4.2% (1)</td>
<td>0.0% (0)</td>
<td>4.2% (1)</td>
<td>25.0% (6)</td>
<td>66.7% (16)</td>
<td>3.50</td>
</tr>
</tbody>
</table>
5.5 Models of Management

There are three models of management for OS-HELP.

- **Handled entirely by another section of the university**
  Some institutional examples are The University of Newcastle, University of South Australia, Murdoch University, The University of Western Australia, Curtin University of Technology

- **Handled entirely by the International Office (excluding payment / debt confirmation stages)**
  Some examples are The University of Adelaide, Macquarie University, University of Technology Sydney

- **Handled jointly between International Office and other sections**
  Examples are University of the Sunshine Coast and University of Wollongong

The effectiveness of each of these models of management is completely reliant on institutional factors. Each model can work.

If OS-HELP is an issue at your institution, consider varying the model of management: outsourcing part or all of the function to another university unit, or bringing part or all of the function in-house.

Some specific examples of practice are:

| University of Technology Sydney | Students go into their Student Administration Portal online and apply for OS-HELP online. From here they print the bank details form. University of Technology Sydney International assesses them and sends them an eligibility letter with instructions on how to activate their loan (if eligible).
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Debt confirmation forms are signed off in-house and then sent to the Financial Services Unit to pay and Student Administration Unit to record the debt.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Southern Cross University</th>
<th>All the forms are online. Students need to complete these at the same time as applying for exchange.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Once eligible – the International Office give them the confirmation of debt form, which students return to them. Students can essentially get access to the funds at any time – so funds are released as soon as the acceptance comes from the overseas university. This is done by sending the relevant documents to Student Services to record the debt, then on to Finance for payments.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The University of Newcastle</th>
<th>Everything is handled entirely by the Fees and Scholarships section, including the advising of students on OS-HELP and assessment of eligibility.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The International Office has found that advising students of how much OS-HELP has been issued in the past year seems to help them overcome any hesitations they might have about taking the loan.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>University of Wollongong</th>
<th>The Outbound Coordinator looks after OS-HELP.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Students are asked to submit an expression of interest form. The International Office asks the Academic division to assess students’ eligibility. Depending on their eligibility, students receive either an offer letter or ineligible letter.</td>
</tr>
<tr>
<td></td>
<td>At final pre-departure, students are issued their final debt confirmation form – a clever way of ensuring participation at the session.</td>
</tr>
<tr>
<td><strong>University of Western Sydney</strong></td>
<td>Students get the forms through the International Office, they do have deadlines but actually process applications on a rolling basis. If eligible, an offer letter is sent – their loan amount is fixed at $5000. Students won’t receive the OS-HELP Debt Confirmation until the host institution has accepted them. The final administration is handled through Registrar’s Office.</td>
</tr>
<tr>
<td><strong>Charles Sturt University</strong></td>
<td>For exchange, students are asked on the application form if they are interested in OS-HELP. CSU Global then checks with Student Administration that students are eligible. If students are ineligible they are advised (and often withdraw). If students are eligible, International provides them with the Debt Confirmation form, plus students must complete a Terms and Conditions form. Students are told not to hand in forms until they have been accepted by the partner university. Once the form is submitted it is given to Finance and the loan is issued to students more or less whenever they want it. This is all handled on a rolling basis.</td>
</tr>
<tr>
<td><strong>Griffith University</strong></td>
<td>Students receive their Debt Confirmation forms (for exchange) at their pre-departure session.</td>
</tr>
<tr>
<td><strong>Victoria University</strong></td>
<td>VicAbroad process OS-HELP applications on a rolling basis. Students apply to them and they assess their eligibility before passing the approvals to finance for final payment.</td>
</tr>
</tbody>
</table>
Section H:
Partnerships, Agreements, Balances and Due Diligence
What’s in this Section?

1. Types of Partners and Models of Engagement ........................................... H:2
2. Creating New Partnerships and Due Diligence ........................................... H:3
   - Due Diligence: Site Visits ................................................................. H:4
   - Service Providers ........................................................................... H:5
   - ‘Ownership’ of Exchange Agreements .............................................. H:5
   - Approving New Agreements ............................................................ H:5
     ○ Examples of Practice ................................................................. H:5
3. Storing Information About Partners ............................................................ H:6
4. Balances and Reciprocity ......................................................................... H:7
5. Reviewing and / or Ending Exchange Agreements ..................................... H:9
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Additional Related Resources ................................................................. H:9

Tools and Examples in this Section

- Exchange Agreement Template Coversheet
- Student Exchange Agreement
- Student Exchange and Study Tour Agreement
- Template Partner Info Sheet
- Partner Engagement Template
- New Mobility Partner Checklist
- Example MOU
- Student Exchange Agreement Template
- Partner Institution Fact Sheet
- Partner Register Template
- Site Visit Checklist
1. Types of Partners and Models of Engagement

Outbound mobility is very dynamic given the broad range of organisations with which it is possible to run meaningful projects and programs.

A non-exhaustive list of partners might include:

- Universities overseas
- Australian universities
- Overseas industry
- Industry associations
- Industry in Australia
- Government (Australian)
- Governments (Foreign)
- Non-Government Organisations
- Service Providers.

How your organisation engages with each of these partner groups will vary depending on the type of mobility and the desired outcomes of the partnership.

See this tool on different models of engagement between training providers and various partner types:

Template: Partner Engagement

Identifying partnerships for international student and staff mobility is crucial to the success of outbound mobility programs and projects.

Key starting points in a region might include Austrade (www.austrade.gov.au) or the international network of Australian Education International www.aei.gov.au.

As part of the institutional survey for this Guide, a number of universities indicated for what sorts of outbound programs/projects they require agreements signed with external organisations.

<table>
<thead>
<tr>
<th>Agreement required?</th>
<th>Yes</th>
<th>No</th>
<th>Not sure</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student exchange</td>
<td>100.0% (23)</td>
<td>0.0% (0)</td>
<td>0.0% (0)</td>
<td>23</td>
</tr>
<tr>
<td>Study tours</td>
<td>33.3% (7)</td>
<td>14.3% (3)</td>
<td>52.4% (11)</td>
<td>21</td>
</tr>
<tr>
<td>Other short programs</td>
<td>45.0% (9)</td>
<td>10.0% (2)</td>
<td>45.0% (9)</td>
<td>20</td>
</tr>
<tr>
<td>Placements (internships / clinical)</td>
<td>30.0% (6)</td>
<td>0.0% (0)</td>
<td>70.0% (14)</td>
<td>20</td>
</tr>
</tbody>
</table>
2. Creating New Partnerships and Due Diligence

Selecting appropriate institutional partners is a key part of successful mobility programs. A good partner will:

- Meet your strategic priorities
- Have a shared vision on student mobility issues
- Be proactive and respond in a timely manner
- Satisfy due diligence expectations
- Be an attractive destination for your students
- Be a good match in the programs they offer

For exchange, Australian universities also consider things like:

- The overseas university’s ranking
- Their support structures
- Courses and subjects on offer
- Quality of the student experience
- Quality of particular areas relevant to the agreement
- Accommodation offerings
- Geographic region
- Has someone visited the institution?

Identifying and selecting new institutional partners can be challenging. Universities should always start with a Gap Analysis (http://en.wikipedia.org/wiki/Gap_analysis) to identify exactly what they are looking for in a new partner.

Several universities have also developed Partnership Strategies to identify and manage their partnership needs over the coming 5–10 years.

You might make contact with potential partners in one of many ways:

- Meetings at conferences
- Visits and delegations
- Referrals from other people
- Searching on the internet and sending an email or ‘cold calling’

For exchanges, for example, Curtin University of Technology has tried to identify new partners through its existing exchange partner network.

What is critical, however, is making sure that each partner meets your institution’s strategic goals and that you have conducted at least a minimal amount of due diligence to ascertain key facts about the organisation overseas.

Here you will find a Checklist for forming new partnerships as well as a basic due diligence guideline:

Checklist: New Mobility Partner Checklist and Due Diligence

Where the mobility of students is involved, partnerships should always be formalised in some way. As the bare minimum, this might involve an agreement done by email as to the responsibilities of various partners for different aspects of a project / program.
More often than not universities choose to formalise agreements through either an exchange agreement (for exchanges) or a Memorandum of Understanding (MOU) (for other mobility projects).

Below are examples of agreements – please note that these are draft documents only and you should seek your own legal advice before using them.

Here you can find an example of a very flexible Memorandum of Understanding document that can be easily tailored for project use:

**Template:** Example Memorandum of Understanding

In the case of a formal student exchange, a lengthier Student Exchange Agreement should be signed. This document lays out conditions for the exchange of students and includes references to things such as accommodation, tuition fees etc.

Here you can find an example / template of a Student Exchange Agreement:

**Template:** Student Exchange Agreement

You can also see examples of RMIT University’s Student Exchange and Study Tour agreements:

**Template:** RMIT University Student Exchange Agreement

**Template:** RMIT University Student Exchange and Study Tour Agreement

**Due Diligence: Site Visits**

Site visits prior to a program, or whilst a program is running, are essential in order to:

- Evaluate partner sites for projects
- Conduct appropriate due diligence
- Conduct risk management

Site visits should be costed into either program-level budgets or the budgets for specific projects.

During a site visit, staff should try to meet key staff at the partner institutions. If the program / project is something like a study tour, staff should try to meet any ground operators or other partners, as well as trying to visit key sites that the project will visit.
Use this Site Visit Checklist tool to evaluate sites and record details of site visits:

![Checklist: Site Visit Checklist](image)

**Service Providers**

Service providers are organisations based either in Australia or overseas that can assist with the development and implementation of outbound mobility projects and programs.

Types of service providers include:

- Travel agents
- Study tour developers
- Short term program providers
- Service learning (volunteering) program providers
- Internship providers
- Professional Conference Organisers
- Other companies assisting with the organisation of logistics (e.g. bus companies, airlines etc)

Where specific work is being conducted by service providers, a legally binding MOU or agreement should be put in place for the protection of both parties. As fee-for-service organisations (regardless of whether they are not-for-profit or not), service providers should be given clear expectations of the tasks they are expected to complete – this allows them to structure their charges appropriately and eliminates misunderstanding down the track.

Using service providers can be a way to efficiently implement extra mobility options or relieve the logistics burden of arranging, for example, study tours. As there is a cost involved, institutions need to weigh up the advantage of using a professional organisation to organise parts of a program as opposed to arranging those components themselves – this is the old comparison of cost vs benefit.

**‘Ownership’ of Exchange Agreements**

Exchange agreements are either faculty-to-faculty agreements or institution-wide agreements.

There is no rule as to what combination of these agreement types is ideal. Some universities only sign institution-wide agreements and this works well for them. For others a combination of institution-wide and faculty-to-faculty agreements works best.

Many universities, however, identify that regardless of the types of agreements, their preference is for agreements to be managed and maintained centrally (usually by the International Office).

**Approving New Agreements**

The approval process for new agreements varies significantly from university to university.

**Examples of Practice**

- The University of Western Australia has a standout set of resources for their staff (both professional and academic) to consider arranging new agreements. This includes checklists, a feasibility study and a very clear approval procedure. The University of Western Australia’s detailed process is available online at [http://www.international.uwa.edu.au/staff/agreements](http://www.international.uwa.edu.au/staff/agreements)
• The Australian National University has both general and college-level exchange agreements – delegation for signing for college-level agreements is with the Deans, whilst the delegation for university-wide agreements is with the DVC International. Student Exchange Agreements are only signed if they are likely to be active.

• At The University of New South Wales, the faculties can complete a request form to justify the need for a particular agreement, which is signed off by the Dean. Exchange agreement requests are then funnelled through the international office for further research and consideration. Once signed off by the Pro Vice Chancellor, Legal puts together the agreement and it is provided to the DVC Academic for sign off.

• At Charles Sturt University, the agreement process can be started by faculties or the international office. The university is trying to focus on university-wide agreements and the Vice Chancellor is the only person to sign off on them – he won’t do so for exchanges unless it’s come through the mobility section.

• Southern Cross University’s international office manages all study abroad and exchange agreements. Academics are asked to put all agreements through them, although schools can sign their own MOUs. They have resources for staff that gives them information (in 6 brief points) about what criteria need to be met for exchange agreements, along with the process on how to do it. The Director International has delegation to sign off.

3. Storing Information about Partners

It is useful to keep a register of outbound mobility partners and the key contacts there. This spreadsheet can be used as a starting point for developing a register of partners:

**Template: Partner Register**

Also check out The University of Western Australia’s Partner Information Sheet:

**Template: The University of Western Australia Partner Information Sheet**

Detailed information about each partner should also be kept on file. This can be particularly useful when providing information to students who may be going on a program or project to the partner institution.

The attached document can be used as a starting point for developing information sheets about partner organisations:

**Template: Partner Institution Fact Sheet**
You can also see this exchange agreement template coversheet from the University of Ballarat which is used as a coversheet on the physical exchange agreement files to track balances and key details about the agreement.

**Template:** Exchange Agreement Coversheet

### 4. Balances and Reciprocity

- As part of the institutional survey for the Guide, 23 universities reported 2692 exchange agreements. This is an average of 117 per institution, with a median of 80. The range was from 28 to 380.

  Of the responding institutions, an average imbalance of 6 semester-length places was ‘tolerated’. The range was from 2 to 20. The median was 5.

  The most common response to imbalances is to put inbound places on hold until sufficient outbound places have been made up. In some cases, agreements are terminated when imbalances become too significant or unresolved.

- University attitudes towards imbalances vary quite a lot. There are several examples of institutions that are ruthless in enforcing balance, as well as institutions that are very relaxed and open to letting as many students participate as possible. The data collection exercise for this Guide has not identified any positive or negative attributes of either approach.

- Anecdotally, distribution of students across a university’s exchange partner network tends to follow the Pareto Principle (otherwise known as the 80-20 rule). Approximately 80% of university’s outbound exchange students tend to go to about 20% of partners. The 80-20 rule is a strong theory for basing reviews of exchange agreement activity – it allows institutions to focus on deepening relationships in the 20% most active partners, attempting to stimulate more movements for the institutions just outside this range, and culling those that are just ‘filling the books’.

- A number of Australian universities, including The University of Melbourne and The University of Western Australia, now have imbalance issues in the opposite direction: they are sending too many students out on exchange and not receiving enough to remain in balance with partners.

  A small number of these institutions are creating dedicated ‘inbound exchange marketing’ line items in their outbound budgets. This money goes towards targeted marketing to attract more inbound exchange students – a step necessary to open up additional reciprocal outbound exchange places. Several universities also provide support to their partners to attend exchange fairs etc.
University of the Sunshine Coast has an innovative approach to keep its exchanges in balance: a group from the international office meets three times per year to decide which partners will be offered as an outbound destination each semester and not all partners are offered each semester. Although it might not work for all institutions, this is a clever way of balancing their agreements.

University of the Sunshine Coast is looking to tell its partners that it wants their students to be recruiting students from University of the Sunshine Coast to go out on exchange. The university is also looking at giving them some sales training on how to recruit Australian students to go on exchanges.

Many universities now use partner-run summer schools to try to address exchange imbalances. In these cases, two or three (or even four) outbound summer places are considered to be equivalent to a single inbound semester place. Curtin University of Technology cited a good example: their relationship with Toulouse Business School was out of balance, but Toulouse opened up their summer school to students and brought it back into balance. Toulouse have also since opened up their Barcelona campus to summer and semester exchanges and everything is not only back into balance but active.
5. **Reviewing and / or Ending Exchange Agreements**

Agreement durations typically range between 3 and 5 years.

A large number of universities indicated that they have either recently reviewed all of their exchange agreements or intend to do so shortly. Many universities feel they have too many partnerships, or too many partnerships that are inactive.

Many universities are looking to deepen relationships with a few partners rather than sign new ones – this might include:

- Adding study abroad components to exchange agreements
- Using exchange agreements for research collaboration
- Exploring transnational arrangements with existing partners

Several universities have formal ‘Agreement Health’ checklists that are used to test whether or not an exchange agreement should be reviewed. These usually include questions like:

- Is there an imbalance?
- How active has the agreement been over its lifetime?
- Has there been any student issues?
- How is the institution ranked?
- Are there any other forms of engagement with the institution?
- Does the agreement generate inbound fee-paying students?
- What ‘strategic’ value does the agreement have?
- Are there opportunities for other forms of engagement? Does the university have any particular strengths that could be leveraged?

Universities provide the following reasons to keep an exchange agreement, even if the agreement isn’t currently working to its full potential.

- It has real potential to have active exchanges
- It supports other university agendas (such as research or prestigious linkages)
- It has potential for new projects, such as short programs or placements
- Personal linkages (between either professional or academic staff) are strong

**Ending Agreements**

Most institutions state that agreements that they would like to cull would either be let to expire or an email / letter would be sent from either the Director of the International Office or the relevant Deputy Vice-Chancellor to the institution.

**Additional Related Resources:**

The University of Western Australia info sheet about their institution to help address exchange imbalances by clear promotion:

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**Case Study:** *The University of Western Australia*  
*Institution Info Sheet*
Section I: Risk Management, Insurance and Critical Incidents

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas
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   - Learning Support ......................................................... I:2
   - Emotional and Health Support ........................................ I:3
   - Critical Incidents ........................................................... I:3
3. Travel Insurance ....................................................................... I:3
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4. Developing your Risk Management Team ................................... I:7
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5. Risk Management Approaches ................................................. I:8
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7. Developing a Critical Incident Response Policy and Plan ................ I:10
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- Safety and Security Information
- Emergency Card
- Implementing iSOS and Insurance Requirements
- Responses to Some Recent Critical Incidents
- Example Email to Students Re: Funding, Insurance and iSOS
- Reference Tool: When Students Should Call Home e.g. What Constitutes an Emergency
- Overseas Activity Notification Form
- Developing a Critical Incident Plan Checklist
- Swinburne University of Technology Risk Guidelines
- Destination Safety Profile
- Key Questions for a Student Emergency Contact Details Form Checklist
- Study Tour Risk Management Procedure Booklet Policy
- Emergency Contact Details Form
1. Key Risks in Outbound Mobility

Some of the key areas of risk in outbound mobility are:

- Poor preparation of students
- Visa troubles
- Critical incident risks, such as student and staff health issues or accidents
- Program risks (partners pulling out, not getting arrangements in place in time)
- Loss of corporate memory if staff depart
- Overspending
- Staff burnout (e.g. Staff being on call 24/7 during programs, getting worn out arranging projects for many years etc)
- Inappropriate student or staff behaviour during programs
- Poor uptake by students (could be due to poor promotion, unattractive destinations, or most commonly the cost of the program)
- Lack of support from Senior Management
- Lack of support from teaching staff

2. Kinds of Support Students Need on Programs

Fortunately, a student encountering major issues whilst on a mobility program is relatively rare. Most issues arising during a student’s stay are likely to be minor or administrative in nature.

Support students might require during a program can be broadly split into the following categories, listed in order of seriousness:

<table>
<thead>
<tr>
<th>Logistical support</th>
<th>Learning and administrative support</th>
<th>Emotional and Health support</th>
<th>Critical incidents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less serious</td>
<td>More serious</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Logistical Support

Logistical support includes things like changes to a student’s accommodation arrangements, transport delays or changes, or issues around a student being able to contact home.

Learning Support

Learning support includes any support required in relation to the student’s learning experience in their host country. This might include: difficulty adapting to the teaching style of the host country, problems understanding roles or integrating at a work placement, or difficulty in completing assessment required for some reason associated with being in a foreign country. Learning issues may require additional advising and some patience to resolve but are rarely insurmountable.
Emotional and Health Support

Emotional and health issues are more serious than learning and logistical problems. They have the potential to rapidly turn into critical incidents if not dealt with immediately.

Minor health issues might include minor sicknesses (coughs, colds, flu, headaches, hangovers, gastroenteritis etc) and allergies. Some ailments may be the result of fatigue from long-haul travel, so students should be encouraged to rest rather than ‘push through’ an illness.

Emotionally, students may suffer from homesickness and culture shock. Usually some reassurance and counselling from the host institution, or a project leader, is sufficient to deal with these minor issues that arise as a result of being in a foreign environment.

Critical Incidents

Critical incidents are major incidents that might encompass any of the issues above but are more severe in terms of the potential impact.

For example, a student missing a bus might only require some logistical support, but a whole group of students being stranded in a country because of international airlines being grounded (like the Iceland ash cloud incident of 2010) could potentially constitute a critical incident.

3. Travel Insurance

Comprehensive travel coverage is essential for all students and staff taking part in outbound student mobility projects. The consequences of insurance not being in place in the event of an accident abroad are catastrophic – this is perhaps one of the single most important issues in regards to outbound mobility projects.

A good policy will include, as a minimum:

- Unlimited medical expenses
- Repatriation coverage (in the event of illness, injury or repatriation of remains)
- Liability coverage of $2.5 million
- Travel coverage (travel delays, loss / delay of baggage etc) of $10,000 as a minimum

Good policies may also specifically cover computers, cameras and even cash.

Your university needs to decide what approach to take in regards to insurance. The options are:

- Staff and students covered by an institutional policy
- Staff covered by an institutional policy, students’ insurance purchased separately
- Staff and students’ insurance purchased outside of any institutional policies

Many institutions now directly cover students’ travel insurance needs through institutional policies.

Approximately half of Australian universities organise, or offer to organise, travel insurance for their students. Detailed statistics about institution’s approaches to travel insurance are available in the AUIFD’s benchmarking statistics on outbound mobility: see [http://cunningham.acer.edu.au/inted/aiec2011auidfresearchpaper.pdf](http://cunningham.acer.edu.au/inted/aiec2011auidfresearchpaper.pdf)

However, despite the inherent risks of international travel, several universities still do not closely monitor students’ travel insurance purchase or coverage. The majority of institutions do not track all international study activity and are not able to identify, in a straightforward manner, which of their students are abroad, or where they are, at any given time.

There is a clear trend in Australian universities towards paying far greater attention to travel insurance and risk factors for students on outbound mobility programs. As outbound numbers increase in the coming years, universities need to be increasingly vigilant, and active, in monitoring their students’ international movements to mitigate as many of the risks as possible.
Universities that do not provide insurance and do not collect evidence of insurance are exposed to the significant risk of a student encountering major trouble without adequate coverage. In the event that participants must purchase their own insurance, proof of coverage should always be provided prior to departure of students.

**Travel Insurance Coverage**

An increasing number of universities are providing travel insurance for their students. This is predominantly for exchange programs, though many universities provide coverage to students for any ‘approved’ activity: ‘approved’ has been interpreted to mean: for credit; for acknowledgement (e.g. by the university’s International Leadership Program); for a hurdle requirement; or, a non-credited experience that has been endorsed in some way by the faculty.

Does your institution provide travel insurance for students going on OUTBOUND EXCHANGES?

![Bar chart showing the response to the question: Does your institution provide travel insurance for students going on OUTBOUND EXCHANGES? Yes: 14, No: 2.](chart.png)
Examples of Practice

- University of Technology Sydney’s university policy covers students for health and travel cover. Students don’t pay excess for medical and have a $200 excess for other claims. It covers 25% personal travel and students can extend through an online portal if they want.

- At The University of Queensland, students are covered for one semester plus 5 days either side for personal travel. They must have their own coverage beyond this. UQ Advantage Award students are all covered as long as they are considered ‘endorsed’ and on ‘university business’. Students claim by filling out a claim form (verification at some point comes through the mobility team or the insurance office to verify they were on university business).

- University of the Sunshine Coast has a general travel insurance policy for the university that covers up to 290 days for students. This policy is quite comprehensive and coverage is automatic. Students are given a document before going detailing what they’re covered for and how to claim. Private travel is covered up to 60% of the total time away – students are encouraged to purchase their own policies on top of this.

- All outbound students at Edith Cowan University are covered by university insurance. They complete a form and up to 60% of the total time on personal travel is covered. All the paperwork comes to the outbound team and all the data goes onto one big spreadsheet, including their travel details, accommodation details etc. This information also gets loaded up on the students’ record.

- Students at Queensland University of Technology are covered for their programs by the university. Students often get their own additional insurance though, particularly for the US. All the travel forms come to the mobility team.

- The Australian National University covers students as long as they are travelling for the purpose of studying – this coverage is really emergency coverage, but it is still very extensive. Students going away have to sign a form for the Insurance Office – the process is handled exclusively by that office.

- The University of Western Australia has coverage for all students including a certain amount of personal travel.
• The University of New South Wales covers students for travel insurance. The mobility office provides a list of students to the Risk Management section which then handles the details. Coverage doesn’t cover electrical gear, covers lost luggage only for 90 days but covers the key areas of repatriation, health and accidents. Coverage is for exchange plus 3 months travel / leisure time up to maximum time away of 1 year. Students have to complete an online in order to be covered. Students are also advised to get extra coverage.

• Southern Cross University outbound students are not covered by the university, students buy their own (which must have medical insurance) and bring their policy in to have it ticked off.

• The University of Newcastle has coverage for students and drums into them the eligibility criteria – students on exchange have to be enrolled in exchange codes otherwise they are not covered. For short programs coverage is up to 180 days. In order for these students to be covered they must complete a pre-departure quiz online. The International Office then has a list of them and that’s sufficient for students to be covered. Students also need to fill out an ‘Overseas Activity Form’ – this tells the international office exactly what students are doing, if the program is approved. This form also takes students through putting their itinerary into SOS International and at the end takes them to information about the travel insurance policy.

Template: The University of Newcastle Notification of Overseas Activity Form

• At University of Technology Sydney, travel insurance for exchange is automatic. For students in the BUILD International Leadership Program, they must complete the regular staff / student coverage form. This is approved by the coordinator of the BUILD program and put in a shared network folder that is also accessible by the Insurance team.

• Several universities do not provide travel insurance coverage and do not require students to show proof of their travel insurance coverage. Most of these universities have ‘conditions of participation’ documents that students sign stating that they have insurance, but this is not enforceable in any legal way.

• Macquarie University students on exchange are covered by a university policy – they are required to provide travel dates, start date, last date of study, and date of return. The policy covers them for their semester + 30 days leisure. More than this and they need to provide proof of coverage – students will not receive their funding until they’ve provided this.

• University of Wollongong has travel insurance coverage for students going out on any ‘university endorsed’ activity, which means they are enrolled or their program is counting back to their degree in some way. Coverage is free for 180 days and they are required to pay after this. Students are advised that they are covered and receive a letter with their policy number and the policy details etc. Students fill out a few documents to verify they have read the policy etc.

• Swinburne University of Technology requires students to provide proof of insurance and students don’t get their travel grant money until they submit proof of insurance and an emergency contact. Some study tours have insurance built into the price.

• Griffith University students do not receive their funding until they have updated their contact details in the Griffith student portal.
4. Developing your Risk Management Team

Many universities have sections dedicated to risk management or insurance – if this is the case then it is usually this section that takes the lead on risk management and insurance planning issues. If not, institutions may wish to establish an advisory group to analyse outbound mobility risks.

A risk management team might be comprised of the following types of people, depending on the structure of your university:

- A representative of your legal staff
- A representative of your insurance staff
- A representative of management
- Senior officer/s responsible for international activities
- A representative of your student mobility staff (if applicable)
- An academic.

Your risk management team should work collaboratively on the development of your Risk Management policy and should meet regularly (quarterly, for example) to discuss the policy and any incidents that have arisen.

External Risk Management Providers

**Do you work with an external risk management service like SOS International, iJet etc?**

An increasing number of universities are working with professional risk management services. The most commonly used partner by Australian universities is SOS International.

External risk management services have the capacity to both provide advice about particular destinations (e.g. destination risk profiles) as well as monitor students whilst they are abroad.

 Universities using external providers cite some issues, particularly with having to either data enter student travel details or work with particular travel agents who will undertake such work. However the benefits of the service far outweigh any such issues.

One university is considering implementing an administration fee to cover cost of implementing an external risk service, which appears a strong rationale for such a fee.
5. Risk Management Approaches

Data on student registrations from the AUIDF benchmarking found:

‘Universities were asked whether in 2010 they have policies and procedures requiring registration, in the centre of the university, of international study experiences for their students.

In total 32 universities require registration in the centre of the university.

- 14 require registration for all types of international student mobility.
- 8 require registration for exchanges or where there is a scholarship or travel grant from the university.
- 8 require registration for exchanges only.
- 1 requires registration where there is a scholarship or travel grant from the university.
- 1 university wrote in that ‘research students register with the Research Office and have any international travel approved; in country study tours that have credit applied to a degree have it noted by Faculty and on central student records’.


Universities have a wide range of approaches to risk management. Some aspects of these approaches are noted here:

- La Trobe University uses SOS International’s ‘Citybrief’. The university also has a risk management office. Every student is required to fill out a travel form and a risk form.
- At The University of Western Australia the risk management team is involved as part of pre-departure. They ask their partners if they have a Crisis Management Plan.
- Charles Sturt University checks the DFAT rating of the country for every student going out – students are not able to go to ‘Reconsider the need to travel’ or ‘Do not travel’ countries. All
Students get an emergency card before they go and register with Smarttraveller as part of their pre-departure session.

- Students from University of Ballarat have to contact the UB International Office when they arrive at their host university to let them know they’ve arrived.

- University of Wollongong has Critical Incident guidelines specifically for outbound. The university compiles an emergency contact list of all outbound students each semester which is distributed to all key staff in the institution that have some input on risk: e.g. security services, accommodations services, the DVC International, and the mobility team.

- Queensland University of Technology wants students to now provide a phone number they can be contacted on at their destination.

- The outbound staff at University of the Sunshine Coast have to complete a risk assessment activity each semester for each country that students are going to on exchange. This is then monitored by the central risk management team. Students are also required to register with SmartTraveller and are asked to confirm they have arrived at their host and to provide a contact.

- Numerous universities have mobility staff on-call (by mobile phone) whilst students are overseas

- For several universities, students with emergencies contact either the security office, insurance or risk management teams

### 6. What are Critical Incidents?

A critical incident is defined by the National Code as ‘a traumatic event, or the threat of such (within or outside Australia), which causes extreme stress, fear or injury’.

Critical incidents may include, but are not limited to:

- Serious injury, illness, or death of a student or staff
- A missing student
- Severe verbal or psychological aggression
- Physical assault
- Student witnessing a serious accident or incidence of violence
- Natural disaster e.g. earthquake, flood, windstorm, hailstorm, or extremes of temperature
- Significant interruption to the ability of a student or group to travel (as a result of environmental or socio-political issues)
- Social issues e.g. sexual assault, drug use, alcohol abuse

Minor incidents may escalate into critical incidents if not managed, or critical incidents may take place without notice.
7. Developing a Critical Incident Response Policy and Plan

Does your institution have a Critical Incident policy that specifically covers students on overseas activities?

The first step in preparing for Critical Incidents is the development of a critical incident plan or policy that has specific reference to students who are abroad. Every institution engaging in outbound mobility should have such a plan.

Key aspects of your plan should include:

- What needs to be put in place to be ready for a crisis
- Stakeholders in Risk Management Planning
- Developing a ‘Safety Profile’ for Programs / Destinations
- Types of crises for students
- Resources ‘on the ground’ for assistance in the event of a crisis
- Critical incident response checklist
- Code of conduct for students and staff.

Far more information is available in this tool which can be used to help develop your critical incident response policy / plan:

**Checklist: Developing a Critical Incident Plan**
Here are examples of several risk management policies from Swinburne University of Technology:

- **Policy:** Guidelines in the Case of Natural Disaster
- **Policy:** Guidelines in the Case of Mental Illness
- **Policy:** Guidelines in the Case of Pandemic
- **Policy:** Guidelines in the Case of Physical Illness
- **Policy:** Guidelines in the Case of Terrorist Attack

A Google search will also bring up a large number of examples of Critical Incident Policies from different universities.

The second part of preparing for a critical incident is collating project / program-specific information, such as:

- Identifying the risks associated with your project
- Identifying local resources you might be able to use (hospitals, Australian Embassies etc) in the event of a critical incident. Some internet research is usually sufficient for this. A list of Australian diplomatic missions abroad can be found at [www.smarttraveller.gov.au](http://www.smarttraveller.gov.au)
- Collecting participant-specific information such as health details and emergency contacts

**Case Study:** Emergency Contact Details Form
Risk Planning for Outbound Projects

Risk management is a key part of planning any outbound project. Any risk management activities you complete should be done in conjunction/consultation with your institution’s Risk Management Plan.

For each project or unique program some of the things you should consider doing are:

- Complete a Safety Profile for the destination

**Template:** Destination Safety Profile

- Ensure you have the Emergency Contact details for each and every student attending

**Checklist:** Key Questions for a Student Emergency Contact Details Form

- Ensure every student has appropriate travel insurance coverage
- Refer to [www.smarttraveller.gov.au](http://www.smarttraveller.gov.au) to check if there are any relevant travel advisories in place for the destination (if the warning level is anywhere at or above ‘Reconsider your need to travel’ you should consider deferring the project).
- Develop an Exit Strategy – how will you get students out of the area in the event of an incident?

You should consider undertaking a risk analysis for each destination in which you are running projects.

See also this example of a Study Tour risk management procedure from Swinburne University of Technology:

**Policy:** Study Tour Risk Management Procedure Booklet

**Risk Matrices**

Consider using a Risk Matrix, which is a document specifically designed to help you identify program risks and plan solutions to potential future problems. A quick Google search for ‘Risk Matrix Template’ will bring up many examples that you can use or adapt for your own purpose.
8. Responding to Critical Incidents

Whole websites, books and companies are dedicated to responding to critical incidents and crises and these resources are custom-designed to provide you with concrete plans for responding to critical incidents, so this Guide is not designed to address this issue in detail.

If a critical incident arises your first priority should always be the safety and well-being of your students. You should make contact with the student/s as soon as possible to get information about the situation and to make sure their immediate situation (health, safety, comfort etc) is stable. Once you have ascertained that they are not at any immediate risk, you should;

- Consult and follow your critical incident plan
- Work out what the participant’s needs are: immediate needs (do they need medical support, accommodation, financial support, transport?); subsequent needs (transport home, ongoing medical support etc); and long term needs (ongoing counselling etc)
- Work out who is best able to respond to those needs
- Take action

Many universities have student mobility staff that are on call whilst students are abroad. There is at least one example of a university providing guidance to students as to ‘what constitutes an emergency’ – this is probably prudent practice to reduce non-essential inbound calls.

At several institutions emergency calls are handled by Security or the university’s risk management teams, before being delegated out if required.

See Griffith University’s submission about responding to Critical Incidents:

**Case Study:** Griffith University Crisis Management

**Travel Insurance**

Every student participating on an outbound mobility program must have travel insurance as the consequences of a student having an accident without coverage are simply too great.

If an incident occurs to students whilst they are overseas, the company providing their travel insurance is a valuable source of support. They have specialist staff on call 24 hours per day to provide advice as to how to respond to a particular situation.

For the purposes of travel insurance claims, students also need to keep as much documentation as possible to validate later claims. This includes: receipts, reports from officials (police or other), reports from accommodation or transport providers, medical reports, bag tags, transport tickets etc.

People should keep as much documentation as possible as insurance companies want to see proof of everything prior to paying out a claim.
Additional Related Resources:

The University of Western Australia’s very comprehensive ‘Safety and security information’ for students:

Reference Tool: The University of Western Australia Safety and Security Information
Outbound Mobility Best Practice Guide for Australian Universities

Section J:
Working with Campus Stakeholders

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas
What’s in this Section?

Practice and Trends in Australian Universities .................................................. J:1
Examples of Good Practice .................................................................................. J:1

1. Student Mobility Committees ................................................................. J:2
   - Strategic Level Committees ............................................................... J:2
   - Operational Committees ................................................................. J:3
   - The ‘Outbound Mobility’ Committee ................................ ................. J:3

2. Communication and Training ................................................................. J:3

3. Generating Buy-In and Managing Change ............................................... J:5
   - Managing Change ............................................................................. J:5

Tools and Examples in this Section

- Griffith University’s Exchange Showcase
- Generating Buy-in and Managing Change Worksheet

Practice and Trends in Australian Universities

- Many universities have committees that have some oversight of outbound mobility. However, specific ‘Student Mobility’ committees are hard to maintain.

- Operational committees that deal with specific aspects of mobility (such as assessing applications or considering credit transfer issues) appear to have good longevity, possibly because they meet a specific need.

- Several universities are undertaking initiatives like ‘mobility showcases’ to highlight the benefits of their programs, and generate buy-in

- Many institutions hold regular meetings with key stakeholders – a key to maintaining good will and generating buy in

Examples of Good Practice

- University of the Sunshine Coast’s work with their domestic marketing unit
- Griffith University’s ‘Mobility Showcase’
- La Trobe University’s mobility communications plan
- RMIT University loading of key documents on the staff intranet
- Queensland University of Technology trains relevant university staff on how to use their new database
• The University of New South Wales meets regularly with the Director of Careers and Employment as this section of the university is very active in seeking internships.

• Swinburne University of Technology sends reports to faculties every week (Deans, Department Heads, ADIs etc) including exchange numbers. Swinburne Abroad communicates with ADIs every month about progress towards targets.

• University of Canberra emails all of their academics before the start of semester outlining UC’s strategic international goals and requested to meet with them about outbound. They try to track supportive academics.

1. Student Mobility Committees

Do you have any institutional committees that have oversight of mobility?

Of 23 institutions responding to the survey, 13 indicated that they have a committee that has some form of oversight over student mobility.

Committees effectively exist at one of two levels: strategic or operational.

Strategic Level Committees

Most often, the strategic-level committees are broad Internationalisation committees (often called something like ‘International Advisory Group’ or ‘Internationalisation Committee’). Outbound mobility is usually only a small focus of these groups.

An example of where outbound mobility is strongly represented at this strategic level is the University of Melbourne where Melbourne Global Mobility has a place alongside Deans and Deputy Vice Chancellors on the select International Engagement Advisory Group. International recruiters are not represented on this group, which highlights the importance of student mobility at Melbourne.
Operational Committees

Operational committees come in many forms and address a wide variety of functions. Operational committees seem to work as they serve a very specific purpose. For example, the Student Exchange Committee (http://www.international.mq.edu.au/goingabroad/important) at Macquarie University approves exchange applications: it consists of the Dean of Students, an academic, the outbound mobility team representative and a Macquarie International management figure.

Similar operational committees exist at many other institutions covering topics such as:

- New programs
- Credit transfer
- Scholarships
- New agreements
- Critical incidents.

At Deakin University, each faculty has an international Operations Group, which considers many aspects of international operations for the faculty, including mobility. Each faculty also has a Strategic Group.

Operational committees are an opportunity to draw in members of the wider university community. For example, the Student Exchange Selection Committee at The University of Western Australia includes a representative of one of the residential colleges. This helps to increase the ‘reach’ of the mobility program.

The ‘Outbound Mobility’ Committee

Another form of committee is a specific Outbound Mobility committee.

Many institutions have had an ‘Outbound Mobility’ or ‘Student Mobility’ committee at some point. However, it seems that it is difficult to maintain the momentum of this form of committee and often they either cease to exist or are merged with other committees.

An example of a mobility committee that works is the Student Mobility Advisory Group (SMAG) at La Trobe University. This committee considers aspects such as new program development, timelines, policy etc. Key stakeholders come along, but anyone is welcome. The committee meets three times per year and outcomes go back to the broader institutional Internationalisation Committee for approval.

2. Communication and Training

Generating buy-in from stakeholders relies on effective communication and training.

Communicating with stakeholders might include:

- Providing them with the list of benefits of outbound mobility (see 3. Generating Buy-In and Managing Change).

- Putting together a brief guide for parents.

- Organising a once-per-semester function for academic and professional staff to thank them for supporting study abroad and exchange (one institution does this on all of its 3 campuses).

- Conducting information sessions about outbound mobility, processes etc to all campus faculty/staff, so they know who to contact and can advise students. This can be as simple as inviting staff along to regular information sessions for students, which Southern Cross University has done in the past.

- Several institutions indicated that they hold regular meetings with key staff. For example, The Australian National University team meets each of their Colleges at least once per semester (meeting with either the person that has responsibility for exchange in the faculty, or a relevant sub-Dean etc.).
• Trying to get time to present to existing academic forums.

• One institution provides a promotional DVD about outbound to each campus to assist faculty and professional staff.

• Providing guidelines and training on the outbound mobility program.

• Involving stakeholders as part of a project.

• Using an initiative to generate excitement about outbound mobility, such as the iLEAD program at the University of Newcastle (www.ilead.edu.au).

The University of the Sunshine Coast has a very close working relationship with its domestic marketing team. Domestic marketing uses University of the Sunshine Coast’s ‘GO Program’ (Global Opportunities) widely in its marketing efforts, highlighting the possibility for students to travel all over the world with funding support from the university.

Griffith University held a ‘Mobility Showcase’ to highlight the program to various stakeholders around the university. The showcase included presentations from students as well as from an academic who led a very successful program to Nepal.

Case Study: Griffith University Exchange Showcase

La Trobe University built a mobility communications plan that addresses how they are to reach out to stakeholders. This includes doing a roadshow to all campuses each semester, doing information sessions for staff, trying to build presence on satellite campuses and running email campaigns.

RMIT University’s staff intranet holds the following documents: flow chart on the process for exchange; all forms students need; how to line up meetings with student mobility staff.

Queensland University of Technology is in the process of training all the relevant university staff, particularly faculties, on how to use their new database ‘SEMS’. See Using Technology section. This new database has a lot of student data loaded in so that all staff with database access are able to have consistent information instantly available.

The University of New South Wales team meets regularly with the Director of Careers and Employment as this section of the university is very active in seeking internships. The section has a guide for first year students and one topic in there is about going on exchange. The section also does targeted promotions for outbound internships and the outbound team promotes their outbound programs at the Careers, Volunteer and Internship Expo (this event attracts ~3000 students along in 2 hours).
3. Generating Buy-In and Managing Change

Outbound mobility is highly valuable to institutions, however, generating buy-in and participation in the face of competing priorities can be tricky.

Making it easy for staff to be involved, with as little interruption to their other activities, is a key. Staff needs to be convinced of the benefits and have barriers removed or minimised.

Reference Tool: Benefits of Outbound Mobility

Reference Tool: Impact of Mobility on Universities

Managing Change

Generating buy-in can also be about managing change. The following worksheet is to assist institutions in stepping through the change management process. Drawing on the work of Kotter (1996) institutions can customise an eight stage process to garner support and embed change. Kotter’s research outlines an eight stage process to create major change:

1. Establish a sense of urgency
2. Create the guiding coalition
3. Develop vision and strategy
4. Communicate the change vision
5. Empower broad-based action
6. Generate short term wins
7. Consolidate gains and produce more change
8. Anchor new approaches in the culture.

The attached template can be used by project managers and administrators to map out a path for generating institutional buy in and supporting change. This eight stage process may form part of your strategic planning process or stakeholder engagement plan.

Template: Generating Buy In and Managing Change
Outbound Mobility Best Practice Guide for Australian Universities

Section K:
Working with Faculty

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas
What’s in this Section?

1. Working with Academics .......................................................... K:2
   - Supporting Champions and Other Academics .......................... K:2

2. Staff Mobility Programs .......................................................... K:4

3. Selecting Staff for Outbound Projects ...................................... K:5
   - Role of Group Leaders on International Placements ................. K:5
   - Supporting First Time Academic Leaders on Overseas Programs K:5

Tools and Examples in this Section

- Study Tour Leader Guidelines Policy
- New Academic Leader Checklist
1. Working with Academics

Australia universities recognise the enormous value of having ‘academic champions’ – academics who intrinsically support outbound mobility.

Academic champions:

- Understand the benefits of outbound mobility
- Are enthusiastic about students participating on outbound experiences
- Help promote mobility
- Launch or get involved in new initiatives
- Support credit transfer for experiences
- Advocate the importance of mobility with colleagues
- Participate in committees, brainstorming activities and other feedback forums and activities.

**ESTIMATE how many ‘academic champions’ you have at your institution.**

![Bar chart showing distribution of academic champions](chart.png)

Supporting Champions and Other Academics

A 2008 survey found that institutions have an average of ten academic champions and that they are seen as one of the most efficient and effective promoters of outbound mobility as they have constant interactions with students.

In the following table, international offices rated the supportiveness of academics for ‘credit transfer’ and ‘supporting student mobility’ as more than 6.5 out of 10. However their support in ‘promoting student mobility’ was given an average rating of just 4.5 out of 10. This suggests that there is great scope for academics to be encouraged to promote mobility more, bringing it more into line with other areas of support for mobility.
### Table: Supportiveness of academics in outbound mobility areas

<table>
<thead>
<tr>
<th></th>
<th>Average Rating</th>
<th>International office supports academic travel</th>
<th>No support for academic travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit transfer</td>
<td>6.8</td>
<td>6.9</td>
<td>6.4</td>
</tr>
<tr>
<td>Supporting student mobility</td>
<td>6.5</td>
<td>7.1</td>
<td>5.4</td>
</tr>
<tr>
<td>Promoting student mobility</td>
<td>4.5</td>
<td>4.9</td>
<td>3.5</td>
</tr>
</tbody>
</table>

*Scale: 1 = not supportive  10 = extremely supportive*

The table also shows that institutions that have international offices that support academics’ travel in some way enjoy significantly more support from academics. Currently a little over half of institutions contribute in some way towards academics travel, including providing funding (such as funding obtained through DIISRTE grants), arranging meetings and itineraries, providing contacts and other advice.

Supporting academics’ travel has a clear, positive impact on their supportiveness for outbound student mobility. Committing additional resources to creating and looking after academic champions is a wise investment for universities interested in increasing mobility. Several universities indicated that they use DIISRTE mobility funding to help generate buy-in from academics.

Several universities noted that workload calculations are a challenge to increasing buy-in from academic staff. With administrative and teaching loads increasing, academic staff have limited time to commit to activities seen as ‘non-core’, such as outbound mobility. This edition of the Guide has not sought to address the issue of academic staff workloads.

Some ideas for generating more buy-in from academics are:

- Monash University run a workshop for academics interested in leading study tours that helps them make their program compliant for OS-HELP funding.
- There is an informal group of academics at Murdoch University who have an interest in outbound mobility that meet periodically.
- Some institutions indicate that they are trying to develop resources (such as a toolkit) for academics that they can use to help promote outbound opportunities.
- A couple of universities bring academics with them on marketing trips – they can make special presentations, be guest speakers and also work exhibitions etc.

The following checklist consists of information provided by Monash University to Short Term Program coordinators to make sure their programs and student applications are compliant:

**Checklist:** Monash University Guidance for Course Coordinators
2. Staff Mobility Programs

Most universities have some form of Staff Mobility Program. These are designed to allow both academic and professional staff to have international experiences through visiting partners, undertaking research collaboration, leading international outbound projects etc.

Whilst this Guide has not specifically sought to identify examples of Staff Mobility Programs, it seems reasonable to assume that these programs would have a positive impact on outbound mobility at an institution.

- Deakin University produced an annual magazine in 2010 called ‘Around the World (and home again!)’ that highlights examples of Deakin’s international engagement and collaboration. Check out a copy of the magazine here:

  ![Deakin University Magazine Special Edition](image)

Deakin University also has a popular and well-established Staff Mobility Scheme.


**Case Study:** Deakin University Magazine Special Edition

Does your institution have a ‘staff mobility’ program? e.g. financial support for academics to visit partners, active formal arrangements with partner universities to swap staff etc.

![Pie Chart](chart)

- Yes: 38%
- No: 50%
- Not sure: 12%
3. Selecting Staff for Outbound Projects

Some centrally-developed outbound projects require a faculty member to attend as a leader or facilitator. This is an excellent way of generating additional support for outbound mobility from faculties.

It is critical to have a robust staff selection process in place for outbound mobility projects such as study tours. This might mean asking potential leaders to complete an application, undertake an interview and obtain final approval from their faculty if they are to be successful in their application to lead a project.

Role of Group Leaders on International Placements

Staff members who take on the role of group leader on overseas projects (such as study tours) should be bound by the usual policies of the university – this includes Occupational Health and Safety, as well as rules relating to proper conduct. International offices might ask project leaders to take a leading role in pre-departure, on-project and post-project activities.

The Study Tour Leader Guidelines below have been developed as a basic set of requirements for staff on overseas programs. This template is a guide only as to what the expectations and roles of a group leader may be.

Policy: Study Tour Leader Guidelines

Supporting First Time Academic Leaders on Overseas Programs

There is no ‘off the shelf’ product to prepare staff to be group leaders.

Some of the key skills that have been identified as vital for teaching staff in managing overseas programs are:

- Ability to operate in complex situations
- Ability to operate in a cross cultural environment
- Ability to plan, manage and report
- Ability to empathise and counsel students on academic, social and emotional issues
- Ability to prioritise tasks and manage conflict
- Ability to interact with a range of stakeholders and meet their specific needs
- Ability to work autonomously but also as a team member where required

The new academic leader checklist may assist you in preparing your teaching staff for an offshore experience. This is not an exhaustive list but aims to check off some of the basic requirements that will ensure a successful project. This checklist may be used as the basis for a pre-departure meeting between the group leader and key project manager at the university. This checklist should be used in conjunction with the staff skills audit (see Section L: Types of Outbound Opportunities) that should be completed at the commencement of a program to ensure that leaders have the required skills before they depart.

Checklist: New Academic Leader Checklist
Outbound Mobility Best Practice Guide for Australian Universities

Section L:
Types of Outbound Opportunities: What they are and how Institutions Handle them

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas
What’s in this Section?

1. Overview of Types of Opportunities on Offer ........................................... L:2
2. Semester Exchange .................................................................................. L:4
3. Offshore Campuses ............................................................................... L:5
4. Study Tours and Short Programs .............................................................. L:5
   − Some Strong Models ............................................................................ L:6
      ○ Examples of Practice ......................................................................... L:7
   − Conducting an Internal Capability Audit .............................................. L:8
5. International Volunteering ..................................................................... L:8
6. Internships and Clinical Placements ....................................................... L:8
   − Examples of Practice in Australian Universities ................................ L:9
7. International Leadership Programs ....................................................... L:10
8. Language Programs ............................................................................... L:11
   − Snapshot of Language Program Availability ...................................... L:11

Additional Related Resources ................................................................... L:11

Tools and Examples in this Section

- Short Term Program Operational Plan
- Checklist for Independent Study Abroad
- Information provided to Short Term Program coordinators to make sure their programs are compliant and student applications are ok
- Centrally Funded Short Term Programs
- Case Study: Griffith University Honours College
- Research paper on Leadership Programs
- Example of hurdle requirement being used to drive Engineering Mobility
- Addressing exchange imbalances with Korea via short term mobility
- Indigenous Exchange Partnership between Griffith University and Simon Fraser University
- Gap Analysis
- Washington Internship Program
- Curtin University of Technology ‘Go Global’ Program for OT Students: http://healthsciences.curtin.edu.au/international/go_global.cfm
- RMIT International Industry Experience and Research Program: http://www.rmit.edu.au/riierp
- Partner Engagement Template
1. Overview of Types of Opportunities on Offer

There is an extensive range of overseas outbound mobility opportunities on offer for students of Australian universities, including but not limited to:

- Semester and year-long exchanges
- Independent semester or year-length study abroad
- Study tours
- Partner-run short courses (summer and winter schools)
- Independent short courses
- Subjects with overseas components embedded
- Volunteering and service learning options
- Internships and work-integrated learning options
- Clinical placements
- Co-op placements
- Dual degree options
- Research opportunities
- Virtual mobility
- Leadership activities
- Conferences
- Moots
- Model United Nations
- EU / AU options.

For the purposes of this guide, Postgraduate student mobility has not been addressed. Postgraduate mobility most commonly incorporates the research, study tour and internship mobility types.

Virtual mobility is a topic that has been mentioned by several universities throughout the course of data collection, but this topic is also not addressed in this Guide.

Some overarching points about the types of outbound opportunities in Australian universities are:

- There has been significant growth in almost all types of mobility programs over recent years, as well as growth in funding support for those activities.
- Short term options are growing proportionally much faster than longer programs and now represent a majority of all experiences.
- A number of universities have decided to embrace an ‘all types of mobility’ model by opening ‘International Leadership’ or ‘Global Citizenship’ programs as a way of acknowledging all outbound experiences.
- Many universities are focusing on credit-bearing opportunities. Semester exchange is still the priority for the significant majority of institutions.
- There is a trend towards trying to capture information centrally about all outbound opportunities available at an institution.
- At least one university (Deakin University) has identified an international study opportunity for every degree type: an exchange, short program or other option.
Approximately half of universities attempt to have all program activity captured by their central international office in some way. Some institutions achieve this through:

- Offering travel grants
- Requiring students to register for travel insurance coverage
- Allowing students to get ‘points’ towards an extracurricular international leadership program
- Requiring students to enrol in a non-credit unit
- Putting in place ways to capture activity for the Australian Higher Education Graduation Statement
- Requiring students to complete an ‘overseas activity form’.

Risk management is the primary reason for capturing where and when students are going abroad – central offices can use this as a compelling argument to require faculties to register their activities.

The table below shows that exchange programs are still the most commonly occurring type of mobility option (there are more exchange options on offer at most universities than any other type of experience.

<table>
<thead>
<tr>
<th>Mobility Option</th>
<th>Response Average</th>
<th>Response Total</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exchanges (i.e. number of exchange partners)</td>
<td>117.04</td>
<td>2,692</td>
<td>23</td>
</tr>
<tr>
<td>Short programs with partner universities</td>
<td>15.79</td>
<td>300</td>
<td>19</td>
</tr>
<tr>
<td>Study tours</td>
<td>11.80</td>
<td>236</td>
<td>20</td>
</tr>
<tr>
<td>Internships or clinical placements</td>
<td>21.31</td>
<td>341</td>
<td>16</td>
</tr>
<tr>
<td>Research</td>
<td>9.00</td>
<td>99</td>
<td>11</td>
</tr>
<tr>
<td>Other (moots, conferences, volunteering etc)</td>
<td>5.36</td>
<td>75</td>
<td>14</td>
</tr>
</tbody>
</table>

**ESTIMATE the number of outbound options you currently offer in the following areas.**
The following table shows the sections of universities that have responsibility for the management of particular program types and aspects of mobility. We can see that international offices are normally responsible for exchanges and managing travel grants, whilst faculties are far more involved in study tours, research and practical placements like internships and clinical placements.

<table>
<thead>
<tr>
<th></th>
<th>International Office</th>
<th>Faculties / Academic Departments</th>
<th>Other administration section</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exchange</td>
<td>95.8% (23)</td>
<td>12.5% (3)</td>
<td>4.2% (1)</td>
<td>24</td>
</tr>
<tr>
<td>Study tours</td>
<td>39.1% (9)</td>
<td>87.0% (20)</td>
<td>4.3% (1)</td>
<td>23</td>
</tr>
<tr>
<td>Other short term programs</td>
<td>69.6% (16)</td>
<td>73.9% (17)</td>
<td>21.7% (5)</td>
<td>23</td>
</tr>
<tr>
<td>Placements, internships or practical training</td>
<td>43.5% (10)</td>
<td>95.7% (22)</td>
<td>17.4% (4)</td>
<td>23</td>
</tr>
<tr>
<td>Research</td>
<td>8.7% (2)</td>
<td>82.6% (19)</td>
<td>26.1% (6)</td>
<td>23</td>
</tr>
<tr>
<td>Other mobility programs</td>
<td>68.4% (13)</td>
<td>52.6% (10)</td>
<td>15.8% (3)</td>
<td>19</td>
</tr>
<tr>
<td>OS-HELP</td>
<td>69.6% (16)</td>
<td>0.0% (0)</td>
<td>65.2% (15)</td>
<td>23</td>
</tr>
<tr>
<td>Travel grants</td>
<td>95.2% (20)</td>
<td>23.8% (5)</td>
<td>33.3% (7)</td>
<td>21</td>
</tr>
</tbody>
</table>

2. Semester Exchange

Semester and year-long exchanges are covered in greater detail in Section M: Exchange Program Management.

Some broad points about exchange:

- As part of the institutional survey for the Guide, 23 universities reported a total of 2692 exchange agreements, representing a range of 28 to 380 agreements per institution. This is an average of 117 agreements per institution, with a median of 80.

- Of the responding institutions, an average imbalance of 6 semester-length places is ‘tolerated’, with 5 places being the median number and the actual range going from 2 to 20 places.

- Many universities indicate that they are looking to either grow their partner list, or to cull non-active partnerships. A small number of universities have reached capacity with their outbound exchange programs and are needing to focus on recruiting inbound exchange students on open up more places.

- Many universities identified that only a limited percentage of their exchange partnerships are active with mobility in both directions.

- Many universities still have difficulty in sending semester-length exchange students to Asia.

- Several universities use targeted funding (either internal funding or DIISRTE funding) to facilitate exchanges to non-traditional countries or institutions where exchange is inactive.
3. Offshore Campuses

A small number of universities have offshore campuses that have active student participants. Two excellent examples are:

Monash University

Monash University has campuses in Malaysia, South Africa, India and Italy. Their Prato Centre in Italy is host to a great number of outbound students, including semester-length and short-course students. [http://www.ita.monash.edu/](http://www.ita.monash.edu/)

Swinburne University of Technology

Swinburne University of Technology’s Sarawak campus in Malaysia is host to many outbound students participating on both semester-length and short term programs. A great success has been the ease of credit transfer for students going on semester programs – as the curriculum is essentially the same students have no issue in switching to Sarawak for a semester without losing time in their degree. [http://www.swinburne.edu.my/](http://www.swinburne.edu.my/)

4. Study Tours and Short Programs

Short programs can include:

- Faculty-led study tours
- International office facilitated study tours
- Partner university summer and winter schools
- Independent short programs.

For some tools that support the establishment of new projects, see Section N: Establishing New Mobility Projects.

As part of the survey, 19 universities reported 300 short programs – an average of approximately 16 opportunities per institution.

Short programs and study tours are almost always for credit. Programs hosted by universities overseas have the added benefit of being eligible for OS-HELP support.

In regards to DIISRTE funding, many universities have run competitive internal nomination processes for faculties to propose short program options. The best proposals are then advanced to the DIISRTE application stage.

Whether or not faculties need to liaise with the central international office in regards to short programs varies from institution to institution. Best practice appears to be where central offices provide some sort of support to faculties, thus also getting input on risk management and other critical issues, but where pedagogy remains mostly with the faculty.

One university indicated that they are establishing more short term options because *'it allows us more control over the risks that are inherent in outbound mobility'.*

Some universities have leveraged their partnerships with overseas universities to generate attractive opportunities for students. This includes:

- Offers of free or heavily subsidised accommodation
- Offers of fully funded places for students (especially by Korean partners)
- 2-for-1, 3-for-1 and even 4-for-1 places on short programs to balance exchange agreements (see Partnerships in Section H).
**Some Strong Models**

**Queensland University of Technology**

Queensland University of Technology created a pool of international short term mobility funding a few years ago where faculties bid for funding for study tours for credit. A panel of academic and professional staff look at the funding available, rank the applications according to their quality in terms of alignment with university strategy and strength of program. To date, applications supporting activity in Asian destinations or other strategic destinations for the university have been favoured. The panel then decide which projects are allocated funding for that round and funding is announced. There is usually one round per year however on occasion there has been two rounds. Faculties actually manage the development of the programs.

Read this submission from Queensland University of Technology about their mobility funding:

![Case Study: Short Term Application Form](image)

Queensland University of Technology has generously shared an example of their funding proposal template for their short term program funding:

![Case Study: Centrally Funded Short Term Programs](image)

**Charles Sturt University**

Short programs can be initiated by anyone – academics, professional staff or even students. The first step is for them to contact the International Office, who meets with them to get their ideas.

Charles Sturt University Global has a short term program operational plan that helps inform the development and management of the program. This is an excellent template document that includes program details, risk management considerations, budget and travel details. All programs are approved by the Director International and relevant sub-Dean International.

![Template: Charles Sturt University Short-Term Program Operational Plan](image)

Programs can either be self-ticketed (i.e. the student buys their own ticket) or group ticketed. Most short term programs end up being group ticketed.

Students apply to Charles Sturt University Global via a hard copy application form that is tailored for each program and includes a media release so the university can use their photos. Students also provide a scanned passport and 100 words on why they want to go.

The $500 travel grant for short programs students is factored into budget for the program, so students pay a reduced amount. The actual budget runs out of the relevant School's account.
Charles Sturt University Global runs a pre-departure in conjunction with the relevant academic – sometimes by video conferencing. Risk management overseas is handled by SOS International.

Students are required to complete an online evaluation when they get back and Charles Sturt University Global catches up with the academic/s to do a debriefing.

Not all study tours are credit bearing, whilst others have dedicated subject codes set up for them (the science and education faculties have dedicated shell units for this purpose). The credit structure is also noted on the Operational Plan.

Examples of Practice

- University of Melbourne has over 100 short term program, all of which are ‘seen’ in some way by Melbourne Global Mobility (MGM). There is an approval process for them including a checklist, sign-off by the Dean of the Faculty and a consideration of practical issues by MGM. Students no longer take a leave of absence for mobility programs – they are enrolled in a 0 credit, $0 fees subject. They still have to complete a study plan form and pre-departure which allows MGM to track where all of their students are.

- Monash University has an enormous range of programs on offer, see [http://www.monash.edu.au/students/studyabroad/programs/facultyinformation.html](http://www.monash.edu.au/students/studyabroad/programs/facultyinformation.html). 99% of study tours pass through Monash University Abroad, which manages OS-HELP and assists with program design where possible. The faculties are the primary program designers, manage student applications and enrolments.

- Victoria University sends around 100–150 students on short programs each year – these are generally run by the faculties but funding and insurance is taken care of by VicAbroad.

- Swinburne University of Technology ran a program option with one of their partner universities in Colombia where some students participated, as well as two academics who went along to teach part of the program. One of the professors also had the specific task of doing course matching for future exchange students.

- Swinburne University of Technology also targets specific funding to establish one international-office run short program at undergraduate level, and one at postgraduate level, each year.

- Several universities have used the short program/study tour model to facilitate indigenous mobility programs.

- One of Curtin University of Technology’s faculties matched funding from a DIISRTE short term program grant, ensuring that students didn’t have to pay anything.

- At The Australian National University, many subjects have an international component embedded in them – e.g. languages, sciences, geology etc. The International Office is aware of these students/opportunities through funding requests.

- Several universities use ACICIS to send students to Indonesia [http://www.acicis.murdoch.edu.au/](http://www.acicis.murdoch.edu.au/)

- Edith Cowan University has an agreement with one partner where an ECU faculty member teaches at the partner’s summer school in Europe – this is an excellent way of generating buy-in and publicity for the program.

- Several universities have reciprocal short programs, where short term program groups are ‘exchanged’ between the institutions (although not at the same time).

- The University of New South Wales advertises all opportunities on their blog as they become available. Programs can be for credit or not for credit and the level of interaction programs have with The University of New South Wales International varies greatly. For DIISRTE short program funding, they call for applications, rank them and apply to DIISRTE. If successful, they administer the funding, help with insurance etc. As part of the ranking/culling process, faculties are sometime asked to participate. For examples, one faculty submitted 3 applications (of a total of 6 applications received) so they were asked to review and prioritise them.
University of the Sunshine Coast heavily promotes short term programs offered through a Queensland-Hessen mobility agreement. Utilising State-to-State agreements is a clever way of increasing the number of options on offer, given the reduced amount of establishment work required.

**Conducting an Internal Capability Audit**

In all cases, establishing new short programs and study tours requires staff to have particular skills. The Internal Capability Audit tool can be used to assess which staff members within your organisation may be ready to lead or administer an outbound mobility program. Please note that the list of ‘skills’ is by no means comprehensive. Additional columns can be added for different staff members to provide a comprehensive ‘map’ of skills across the university and identify skill gaps that need to be filled.

You may also wish to consult the Teacher Guidelines and Study Tour Leader Guidelines in the **Working with Faculty** section.

5. **International Volunteering**

Several universities, particularly those with International Leadership Programs (see below) actively promote international volunteering options to their students.

- Charles Sturt University lists reputable providers on their website – students are then responsible for making the arrangements for the experience themselves and apply for credit with course coordinators directly. If credit is approved they may then apply for funding.


- Both University of Technology Sydney and The University of Newcastle actively promote overseas volunteering programs through their international leadership programs.

- Macquarie University has a partnership with Australian Volunteers International (AVI) to facilitate international volunteering placements via their PACE initiative. [http://www.pace.mq.edu.au/students/international.html](http://www.pace.mq.edu.au/students/international.html)

6. **Internships and Clinical Placements**

16 universities responding to the survey for the Guide indicated a total of 341 placement opportunities (as distinct from the number of students participating on opportunities), an average of 21 per institution and a median of 10. The range was from 0 to 30.

The overwhelming majority of internship and clinical placements are managed by faculties (95%), with international offices involved in some way (such as funding or recording the experience) in 45% of cases. See the table in **Overview of Types of Opportunities Available**. Other sections of universities are also sometimes involved, for example, the Careers Section for internships (The University of New South Wales has an excellent relationship with their Careers section, see **Working with Campus Stakeholders**.

The most common interaction that international offices have with students on these opportunities is managing funding and risk management considerations (i.e. tracking their activity and managing travel insurance).

Placements occur most commonly in the health and education disciplines.

Several universities have several, or even a majority, of degrees that have Work Integrated Learning requirements. This requirement implicitly drives students to seek internship and other placement experiences, many of which might end up being undertaken internationally.
Internships and clinical placements are used by many universities to send students to non-traditional destinations, especially in the developing world.

**Examples of Practice in Australian Universities**

- RMIT University’s International Industry Experience and Research Program (RIIERP) is perhaps Australia’s standout industry experience program: [http://www.rmit.edu.au/riierp](http://www.rmit.edu.au/riierp). The program has been running for almost 2 decades and has sent close to 2000 students on paid, industry-based experiences.

- Curtin University of Technology’s ‘Go Global’ program is perhaps Australia’s standout international clinical placement program: [http://healthsciences.curtin.edu.au/international/go_global.cfm](http://healthsciences.curtin.edu.au/international/go_global.cfm). This incredible program is pre-dominantly for health students to go on clinical placements to one of four countries around the world. Curtin University of Technology has also just signed an agreement with the University of Alberta for clinical placements, which is a genuine ‘Clinical Placement exchange’ agreement.

- At Southern Cross University, students in the International tourism program have plenty of opportunities to undertake an overseas exchange, thanks to lots of electives, but must also complete an internship in their last semester. 8 students did theirs overseas in 2011 and this is run entirely through the Internship Office in conjunction with the Tourism faculty.

- Some courses at The Australian National University have internships embedded and students are able to undertake these overseas – students must have their signed off by Internship coordinator in the faculty.

- University of the Sunshine Coast has one of their Project Officers working partly on internships as part of their role to deepen relationships with certain partners.

- The University of Queensland’s School of Medicine facilitates up to 400 movements per year – predominantly 1st and 4th year students. This is all handled by the Medical School.

- At Charles Sturt University, students are responsible for organising these opportunities themselves but are tracked by Charles Sturt University Global via their travel grants. Students have to provide confirmation of credit by the course coordinator, complete a Funding Application Form, a copy of their itinerary, passport and travel insurance. Once received, funding must be approved by the International Director before being transferred to students. Students are registered with SOS International whilst abroad. For AHEGS, students complete another form to show they completed their experience.
7. International Leadership Programs

There has been a trend over recent years for universities to develop extracurricular programs that, amongst other outcomes, encourage student participation in outbound mobility. These are often badged as ‘International Leadership’ or ‘Global Citizenship’ programs.

For the sakes of simplicity, these programs will be referred to as international leadership programs. Institution’s rationale for creating these programs varies, as do their structures. One university stated that their leadership program was

‘...a holistic framework to deepen relationships with some partners and to create new partnerships. It really opens up the opportunities for students and the impact has been significant, particularly in the area of non-traditional destinations and types of mobility.’

Another institution noted that their international leadership program

‘...has definitely raised a lot of awareness about outbound. The big events make a big splash that brings in more enquiries. It builds up the excitement about mobility and has increased the diversity of what students are doing, and where they are going, overseas. It’s also as much about internal stakeholders as students, who are now more aware and engaged.’

International leadership programs are an exceptional way of acknowledging non-exchange international experiences, streamlining and centralising processes and raising awareness about outbound mobility opportunities.

John Molony, Vice-President Strategic Planning & Marketing at QS Quacquarelli Symonds, has kindly agreed to share his essay, ‘Curricular and Extra-Curricular Programs Supporting Improved International Learning Mobility Experiences: An Emerging Trend in Australia’:

Case Study: Leadership Programs Essay

This essay specifically addresses some of the Australian universities’ international leadership programs from pages 14–21 and includes some analysis of motivations and models.

- University of Technology Sydney’s BUiLD (Beyond University of Technology Sydney International Leadership Development) program: [http://www.ssu.uts.edu.au/beyonduts/](http://www.ssu.uts.edu.au/beyonduts/)
- The University of Newcastle’s iLEAD program: [www.ilead.edu.au](http://www.ilead.edu.au)
8. Language Programs

Though the number of institutions teaching languages and the number of options available has declined, in-country language opportunities remain one of the important mobility options for many universities. This Guide does not address language programs at length, but records a few observations from universities.

- Students taking up language study are most frequently in the Arts, although there are some notable exceptions (for example, University of Technology Sydney’s International Studies degrees – see Degree Structures).

- Reciprocity with agreements is sometimes an issue because of the level of English of potential inbound students and because it can be complicated for outbound students to find the right, or enough, subjects.

- A lot of language programs are now taught cross-institutionally making the possibility of students undertaking outbound experiences confusing for both students and administrators.

- The move for language programs to be taught cross institutionally puts certain partnerships at risk of failure.

- Study tours for language students have been a popular option for academics. Sometimes these only run on alternate years to ensure adequate student numbers and that staff don’t get burnt out.

- Non-credit study tours also occur with language programs.

Snapshot of Language Program Availability

Universities responding to the survey for the Guide were asked to indicate which languages they taught.

<table>
<thead>
<tr>
<th>Language</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>4.3%</td>
<td>1</td>
</tr>
<tr>
<td>French</td>
<td>47.8%</td>
<td>11</td>
</tr>
<tr>
<td>Spanish</td>
<td>43.5%</td>
<td>10</td>
</tr>
<tr>
<td>German</td>
<td>30.4%</td>
<td>7</td>
</tr>
<tr>
<td>Italian</td>
<td>52.2%</td>
<td>12</td>
</tr>
<tr>
<td>Chinese</td>
<td>78.3%</td>
<td>18</td>
</tr>
<tr>
<td>Japanese</td>
<td>69.6%</td>
<td>16</td>
</tr>
<tr>
<td>Arabic</td>
<td>13.0%</td>
<td>3</td>
</tr>
<tr>
<td>Indonesian</td>
<td>39.1%</td>
<td>9</td>
</tr>
<tr>
<td>Thai</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>Russian</td>
<td>8.7%</td>
<td>2</td>
</tr>
</tbody>
</table>

Additional Related Resources:

The University of Western Australia’s checklist on ‘Independent study abroad’:

Checklist: The University of Western Australia
Independent Study Abroad
Outbound Mobility Best Practice Guide for Australian Universities

Section M:
Exchange Program Management

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas
What’s in this Section?

1. Selection Criteria, Application Processes and Selecting Students ............................. M:2
   - Selection Criteria for Exchange ................................................................. M:2
   - Deadlines ...................................................................................... M:3
   - Application Forms and Process ................................................................. M:3
   - Deposits............................................................................................ M:3
     - Some Institutions with Deposits ...................................................... M:4
   - Acceptance Procedure .................................................................. M:4
   - Student Participant Agreements / Code of Conduct ....................... M:4
   - Managing Students ........................................................................ M:4

2. Student Withdrawals and Funnel Management .................................................. M:7
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3. Examples of Practice for Selection Criteria, Applications and Selecting Students . M:9
   - Highlights of Strong or Interesting Practice ........................................ M:9
   - Further Information about University Exchange Processes ................ M:10

Additional Related Resources ........................................................................... M:17

Tools and Examples in this Section

Key Examples:

- At least one university processes exchange applications on a rolling basis.

- University of New South Wales has had a non-refundable $200 application fee for many years. Students pay through the cashier’s office as part of their application.

- Charles Sturt University and Southern Cross University use video conferencing to manage some aspects of dealing with their students on satellite campuses.

- Several universities require students to attend an information session prior to being given access to the application form for exchange. University of Western Sydney makes a podcast of their session in case students can’t make it.

- The Australian National University advertise a $100 withdrawal fee to ensure that students who submit an online application are committed to the process. This minimises drop outs and reinforces the commitment required to the exchange program.

- The University of Newcastle has an online ‘pre-assessment of eligibility’ questionnaire.

- Swinburne University of Technology does an excellent job of monitoring students’ progress through the process by reviewing the application status of students weekly.

- Flinders University has a Standard Operating Procedure for outbound mobility – a master process for managing students.

- Swinburne University of Technology has two deadlines – an early ‘priority’ deadline and a late one. The first round assessments happen after first ‘priority’ deadline. Applications for the late deadline are processed as they come in.
• Deakin University students with an average mark underneath the required exchange criteria must have a plan approved by an academic skills advisor for how they are going to improve their marks prior to going on exchange. Since implementing this not a single student has been rejected by a partner for having grades that were too low.

**Tools:**

• ‘Next Steps after Applying for Exchange’ information sheet
• Conditions of Participation
• Youth Allowance Letter
• Checklist: Returning Early from Overseas
• Checklist: Extending Exchange
• Exchange Checklist
• Interview Checklist for Non-Standard Applications
• Application Declaration
• Selection Criteria.

## 1. Selection Criteria, Application Processes and Selecting Students

### Selection Criteria for Exchange

Student exchange programs usually work off some of the following selection criteria:

- Student’s performance in their studies (average grade, if they have failed any courses etc). Some universities have variable mark requirements depending on the choice of the host institutions.
- The point the student is up to in their studies (how many subjects studied, how many to go) – most commonly 12 months completed either at time of application or time of participation.
- Personal statement (why does the student want to participate?).
- References (from academics, employers or other people who know the student).
- Interview.

**What are the selection criteria for your university’s exchange program?**

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>GPA (average mark)</td>
<td>100.0%</td>
<td>24</td>
</tr>
<tr>
<td>Studied more than 1 year of degree</td>
<td>91.7%</td>
<td>22</td>
</tr>
<tr>
<td>Not in final semester</td>
<td>33.3%</td>
<td>8</td>
</tr>
<tr>
<td>Referees</td>
<td>83.3%</td>
<td>20</td>
</tr>
<tr>
<td>Personal statement</td>
<td>91.7%</td>
<td>22</td>
</tr>
<tr>
<td>Resume</td>
<td>16.7%</td>
<td>4</td>
</tr>
<tr>
<td>Accepted by a committee</td>
<td>8.3%</td>
<td>2</td>
</tr>
<tr>
<td>Interview</td>
<td>16.7%</td>
<td>4</td>
</tr>
</tbody>
</table>
Most universities require students to have between a passing and credit average.

Your selection criteria should cover points such as:

- Is there a minimum amount of study students need to have completed?
- Is there a minimum level of passes / marks they need to have received?
- Do they need to have any other particular skills / qualifications in order to successfully take part in the program?
- If you are looking for a certain ‘mix’ of students taking part in the program, what backgrounds are you looking for?

Selection criteria, the application process and timelines should always be transparent.

**Deadlines**

Most universities have two deadlines per year, typically closing about six months before the start of the relevant semester.

At least one university has only one deadline per year.

At least one university processes exchange applications on a rolling basis.

**Application Forms and Process**

A significant number of universities still work with paper applications. This leads to significant amounts of data entry and potential for errors. Online application solutions, such as using a cheap online survey tool, can be quickly and easily implemented and have a dramatic impact. See Using Technology in Section F.

As part of their applications, students are usually asked to complete some or all of the following:

- To complete a form with personal details
- To rank universities in order of preference – some universities are asking for up to 10 preferences
- A personal statement
- Attach a transcript
- Calculate their average mark
- Include references
- Include photos
- Attend an interview
- Complete a ‘budget’ or financial statement
- Seek approval for their overseas courses (or research courses available)
- Attend an information session
- Pay a deposit
- Submit a copy of their passport
- Complete an application checklist
- Submit OS-HELP application forms (and debt confirmation in some cases).

**Deposits**

Deposits are a good way of gauging students’ commitment to participating in an outbound program. A student who is committed will generally not hesitate because of a deposit, though one who is unsure about whether or not to participate might think twice about submitting an application.

The goal of asking for a deposit is to reduce the number of non-serious student applications, ultimately reducing the withdrawal rate. There is little or no evidence that deposits impact on the number of genuine applications received.
A deposit should be large enough that it makes students carefully consider whether or not they wish / are able to participate, but not too large as to be financially prohibitive. An amount up to $200 is considered reasonable.

Deposits should be required either as part of the application process or within a short period of time after students receive their acceptance.

**Some Institutions with Deposits**

- The University of New South Wales has had a non-refundable $200 application fee for many years. Students pay through the cashiers office as part of their application – this revenue helps to fund the outbound operational budget (not including scholarships and staffing).

- Deakin University charges an administration fee of $110 (inc. GST) for exchange, $55 for short term programs and a fee for incoming summer schools too. This account needs to be neutral at the end of the year, so any funds raised must be spent. Students either submit a credit card number as part of their application or make a payment to the Cashiers office and attach a receipt.

- Macquarie University has had a $110 application fee for short term programs for many years. See: [http://www.international.mq.edu.au/goingabroad/shortterm/costs](http://www.international.mq.edu.au/goingabroad/shortterm/costs)

**Acceptance Procedure**

Acceptance processes vary greatly between institutions. See the ‘Examples of Practice’ to follow.

**Student Participant Agreements / Code of Conduct**

All universities should require students to sign some form of participant’s agreement or code of conduct. This document is often called something different in every institution but the content is normally very similar.

Student agreements are sometimes built into the application form for exchange, whilst in other cases universities have students sign these disclaimers either after they have been accepted or during pre-departure.

Participant agreements should, as a minimum, include clauses on:

- Expected behaviour and consequences if they do not comply
- Costs students are responsible for
- Health and travel insurance and requirements, such as vaccinations
- Visas and travel – if students are responsible for these or not
- Privacy agreement allowing your university to use students’ details and contact Emergency Contacts if required
- Indemnity.

Some examples are included here, although you will need to develop your own participant agreement in conjunction with your legal officers.

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**Case Study: International Study Program Agreement Form**
Managing Students

Outbound mobility is very resource intensive. There are a number of strategies that institutions can use to generate efficiencies – in particular see Staffing (Section E) and Using Technology (Section F).

24 universities responded to the survey for the Guide regarding which sections of their institution are responsible for managing certain aspects of outbound mobility. In some cases functions are co-managed.

<table>
<thead>
<tr>
<th>Function</th>
<th>International Office</th>
<th>Faculties / Departments</th>
<th>Other administration section</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing the program</td>
<td>95.8% (23)</td>
<td>33.3% (8)</td>
<td>16.7% (4)</td>
<td>24</td>
</tr>
<tr>
<td>Managing outbound exchange applications</td>
<td>95.8% (23)</td>
<td>8.3% (2)</td>
<td>4.2% (1)</td>
<td>24</td>
</tr>
<tr>
<td>Enrolling students in ‘exchange’ units</td>
<td>43.5% (10)</td>
<td>43.5% (10)</td>
<td>34.8% (8)</td>
<td>23</td>
</tr>
<tr>
<td>OS-HELP</td>
<td>70.8% (17)</td>
<td>4.2% (1)</td>
<td>54.2% (13)</td>
<td>24</td>
</tr>
<tr>
<td>Australian government funded exchange programs</td>
<td>95.8% (23)</td>
<td>12.5% (3)</td>
<td>4.2% (1)</td>
<td>24</td>
</tr>
<tr>
<td>Managing any other travel grants</td>
<td>87.5% (21)</td>
<td>12.5% (3)</td>
<td>29.2% (7)</td>
<td>24</td>
</tr>
<tr>
<td>Travel insurance</td>
<td>47.6% (10)</td>
<td>0.0% (0)</td>
<td>66.7% (14)</td>
<td>21</td>
</tr>
<tr>
<td>Credit approvals</td>
<td>25.0% (6)</td>
<td>91.7% (22)</td>
<td>8.3% (2)</td>
<td>24</td>
</tr>
<tr>
<td>Final credit transfer</td>
<td>33.3% (6)</td>
<td>75.0% (18)</td>
<td>20.8% (5)</td>
<td>24</td>
</tr>
<tr>
<td>Study tours</td>
<td>36.4% (8)</td>
<td>86.4% (19)</td>
<td>0.0% (0)</td>
<td>22</td>
</tr>
<tr>
<td>Internships / Clinical placements</td>
<td>30.4% (7)</td>
<td>100.0% (23)</td>
<td>13.0% (3)</td>
<td>23</td>
</tr>
</tbody>
</table>

When it comes to managing student exchange, universities have different approach to how they interact with students. Universities responding to the survey were asked to rank the usual mechanisms through which they communicate with students.

<table>
<thead>
<tr>
<th>Rank</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>In person</td>
<td>17.4% (4)</td>
<td>56.5% (13)</td>
<td>17.4% (4)</td>
<td>0.0% (0)</td>
<td>8.7% (2)</td>
<td>23</td>
</tr>
<tr>
<td>Email</td>
<td>69.6% (16)</td>
<td>13.0% (3)</td>
<td>8.7% (2)</td>
<td>0.0% (0)</td>
<td>8.7% (2)</td>
<td>23</td>
</tr>
<tr>
<td>Information sessions</td>
<td>4.3% (1)</td>
<td>13.0% (3)</td>
<td>34.8% (8)</td>
<td>43.5% (10)</td>
<td>4.3% (1)</td>
<td>23</td>
</tr>
<tr>
<td>Telephone</td>
<td>4.3% (1)</td>
<td>17.4% (4)</td>
<td>30.4% (7)</td>
<td>43.5% (10)</td>
<td>4.3% (1)</td>
<td>23</td>
</tr>
<tr>
<td>Other</td>
<td>20.0% (2)</td>
<td>0.0% (0)</td>
<td>0.0% (0)</td>
<td>10.0% (1)</td>
<td>70.0% (7)</td>
<td>10</td>
</tr>
</tbody>
</table>

Email and in-person are the main ways in which institutions convey information to students, followed by information sessions and telephone. A few universities also highlighted Facebook, video conferencing, the university Learning Management System and student forums as contact channels.

As part of the survey, institutions were asked to estimate how many hours per week their outbound staff spent on certain tasks.
Directly managing students’ enquiries and applications takes up by far the bulk of advisors’ time. This clearly suggests that whilst personal, consistent service is critical in managing outbound exchanges, institutions also need to be able to generate economy-of-scale communication responses in order to deal with the volume of enquiries.

Institutions have responded to this need in some of the following ways:

- The University of Newcastle runs weekly information sessions that also double as drop-in sessions and pre-departure sessions. Newcastle also makes exceptional use of its Learning Management System (see Section F: Using Technology) to manage a high volume of students and provide consistent information.

- Several universities require students to attend an information session, and/or a meeting with an advisor, prior to being given access to the application form for exchange. This serves to gauge students’ commitment, examine eligibility and head off unnecessary questions later on.

- Several universities have drop in times for students in order to ease the time pressure of constant student visits.

- Deakin University is working on refining its communication strategy in an effort to decrease the number of emails to and from students.

- Griffith University holds a ‘Meet / Greet / Mingle’ for students in the middle of the application process. Staff go through some preparation information and have returned students on hand to answer questions. There are facilitated discussions and Q&A time and STA Travel also attend to give away some travel vouchers.

- Multi-campus institutions have some unique challenges. Charles Sturt University has mobility staff on two campuses, but also ensures that other international office staff on other campuses are able to answer basic questions about outbound.
• Students at The University of New South Wales are required to book time with advisors. As part of the application process they use Tungleme [www.tungle.me](http://www.tungle.me) – an online booking system that synchronises with Outlook. Before being able to book time with an advisor students must have attended a general information session, which occur frequently.

• The University of Adelaide has created a web form for students to send questions and get in touch – they are required to tick a box saying that they’ve read the website before submitting this form. They are predominantly a paperless office (all documents are stored on TRIM).

2. **Student Withdrawals and Funnel Management**

Students withdrawing from programs can be quite frustrating for institutions, representing lost time and numbers.

From the survey for the Guide, 22 institutions indicated that an average of 16.4% of applicants withdraw from exchanges. The median was 10% and the range was from 2–50%.

Up to 50% withdrawing from short programs is not uncommon.

Surprisingly, many universities do not track why specific students withdrew from their program – this makes it difficult to refine processes to reduce withdrawals.

Anecdotally or otherwise, universities have been able to identify that students most frequently withdrew for the following reasons:

<table>
<thead>
<tr>
<th>Reason</th>
<th>Possible Solutions</th>
</tr>
</thead>
</table>
| **Finances** | • Requiring students to complete a budget as part of their application  
• Requiring students to submit evidence of financial resources  
• Clear information about the costs involved  
• Prompt assessment of eligibility for, and processing of, OS-HELP |
| **Credit**   | • Better education for staff who approve credit  
• Obtaining approval for students not to require full syllabi for electives taken overseas (several universities have managed this)  
• Using faculty course advisors as ‘gatekeepers’ – educating them on eligibility so that they can advise non-eligible students not to apply  
•确保 that students need to have their credit approved as part of their application, not afterwards |
<table>
<thead>
<tr>
<th>Reason</th>
<th>Possible Solutions</th>
</tr>
</thead>
</table>
| Not getting their first preference | • Highlight the value of exchange in general  
• Ensure students are fully aware they might not get their first choice  
• Require students to research subjects and student experience at all of their preference universities as part of their application |
| Accommodation difficulties  | • Encourage early applications so students have time to investigate options  
• Put outbound students in touch with returned students, or current inbound students, from the host institution |

The Australian National University advertise a $100 withdrawal fee to ensure that students who submit an online application are committed to the process. This minimises drop outs and reinforces the commitment required to the exchange program. This is also applied as a ‘negative service indicator’ on the student’s central record. Students not paying the fee cannot enrol or get their grades. The university would like to have a tiered approach for this in future, where students withdrawing later in the process would be charged more.

Many universities acknowledge the importance of excellent information resources for students as a key to reducing poor quality applications and withdrawals. There are many examples of providing fantastic information for students to read in their own time, including the University of Melbourne’s Outbound webpage ([www.mobility.unimelb.edu.au](http://www.mobility.unimelb.edu.au)) and The University of Newcastle’s use of LMS ([Section F: Using Technology](#)).

Deakin University’s Peer Advisor program (see **Section E: Staffing**) is another exceptional initiative that provides potential students not only with exceptional information but great, personal service that they can relate to.

**Funnel Management**

A few universities are developing strong systems for ‘Funnel Management’.

Funnel management is essentially about trying to understand how customers approach the buying process, and to try to remove the barriers to them buying.

In the case of exchanges, this is about trying to understand why students want to participate, what is likely to get them into the application process in the first place, and why they drop out.

Several universities have systems in place to try to avoid low-quality applications coming in in the first place. The University of Newcastle’s online ‘pre-assessment of eligibility’ is a great example.

Other universities deliberately ‘push students out’ of the funnel when it is clear that they are no longer committed to going on exchange. After all, there is no point trying to follow up applicants that are ‘cold’. Swinburne University of Technology does an excellent job of monitoring students’ progress through the process by reviewing the status of students weekly.

The concepts of ‘Funnel Management’ and ‘Pipeline Management’ are not new in international education, but they are uncommon or even non-existent in outbound mobility. As outbound continues to advance these will be terms and processes that have great value and meaning.
3. Examples of Practice for Selection Criteria, Applications and Selecting Students

The following information captures a snapshot of how institutions manage their exchange application and acceptance process. This information is not intended to be complete or provide an in-depth analysis, it is only to allow institutions to compare parts of their processes to others.

Highlights of Strong or Interesting Practice

There are numerous examples of strong or interesting practice. These points are a summary of points listed under individual universities below:

- The University of New South Wales runs 3 information sessions per week and students must attend one in order to apply – it is at these sessions that students get their application form.

- Over the past 6 months The University of Newcastle has trialled locking students in for places at particular universities early if they’re eligible, which has proven effective.

- The University of Newcastle makes extensive use of its online Learning Management System to provide students information (for more details on this see Section F: Using Technology). Students are required to do a pre-assessment of their eligibility before they can apply online via SurveyMonkey.

- Once the assessment of applications is complete, University of Newcastle students receive an email telling them they’ve been accepted. They are then referred to the LMS to look at list of where they’ve been accepted to go. They are able to accept their place or withdraw – if they accept they have to go through an online pre-departure, hosted on the LMS, and complete a SurveyMonkey quiz in order to accept their place.

- The University of Newcastle students have just over a month to get their overseas application together into a portfolio. All the information and forms for each institution is online on the LMS. They are required to bring this in and attend a pre-departure interview. Assuming everything is in order, the International Office stamps and signs the application then students are required to send their application to the host themselves.

- At University of Western Sydney, the application form is now only available once students have been to an information session (which they have to register for). Students can download a podcast if they can’t make it.

- Edith Cowan University has taken a customer approach to deadlines – setting them later, which is perhaps better for students despite being more difficult in terms of timing for staff.

- Flinders University has a Standard Operating Procedure for outbound mobility – a master process for managing students.

- Where there are no problems with balances or number, Griffith University sends applications to the host ‘blind’ (i.e. with no approval of number of places available). This saves time contacting partners where it is not necessary.

- Swinburne University of Technology has two deadlines – an early ‘priority’ deadline and a late one. The first round assessments happen after first ‘priority’ deadline. Applications for the late deadline are processed as they come in.

- At Swinburne University of Technology, students under the required mark might receive a ‘Conditional offer’.

- University of South Australia students get a very comprehensive guide to student exchange early after their acceptance. This covers visa information and all the other stuff students have to go through between acceptance and departure. The booklet is also available on the website.
• At The University of Queensland, the faculty sends an ‘approval letter’ to students outlining where they are up to in their degree and what will be left after they get back from exchange. A copy is also sent to the mobility team.

• University of the Sunshine Coast does not offer all of their partners as an exchange destination each semester as a way to balance exchange agreements.

• The University of Adelaide operates on a rolling admission system. Students can only enquire online via a web form which asks them to tick a box stating they’ve read the website.

• Murdoch University students can submit their application forms at the Student Central desks.

• Queensland University of Technology has ‘Exchange 101’ and ‘Exchange 102’ information sessions to get students ready to apply and understand processes.

• Deakin University students with an average mark underneath the required exchange criteria must have an approved plan for how they are going to improve their marks prior to going on exchange. The plan is discussed with, and approved by, an academic skills advisor. Since implementing this not a single student has been rejected by a partner for having grades that were too low.

• The Australian National University advertise a $100 withdrawal fee to ensure that students who submit an online application are committed to the process. This minimises drop outs and reinforces the commitment required to the exchange program.

• If all of a student’s choices of institution are full, The Australian National University automatically offers the student a place at an institution they haven’t chosen. The application is online and students can’t get the link until they’ve been to an information session and have provided their details. Students are given one week to accept their offered institution. They then must attend a nomination session to talk about the process, where they are given the relevant forms etc.

• The University of Western Australia makes exceptional use of checklists to ensure a high quality of service and strong information.

• Applicants at University of Technology Sydney no longer need course outlines for approval of electives, only for direct equivalents.

• Students complete the Charles Sturt University Global application form and the host institution application form at the same time – both are submitted as part of the exchange application.

Further Information about University Exchange Processes

Edith Cowan University

• Deadlines are on February 28th for semester 1 and July 31st for semester 2.

• Documents required: paper application form, 2 preferences, financial declaration, personal statement, credit transfer form, academic reference, copy of passport, OS-HELP application if relevant, Course Coordinator signs credit transfer form (to approve credit and endorse app), recent transcript.

• All students are interviewed in person – up to 30 minutes per students: Questions asked include: Why do they want to go? What travel have they done before? Questions about their finances. Scenario type questions. Any academic issues.

Flinders University

• The GPA required is 4.0 / 7.

• Students must have completed 12 months at time of application.
• Students must submit a personal statement, 2 academic references, a budget and credit approval.
• Deadlines: 30 November (for Semester 2), 31 July (for Semester 1).
• Flinders University has a Standard Operating Procedures for outbound – this is essentially a Student Management Plan.
• Applications are assessed and added to a spreadsheet. An Acknowledgment email is sent.
• Students receive their acceptance via email, a request to complete the host application, and can complete a scholarship application (this is done through the Scholarship office).
• Once accepted by the host, students are enrolled by Enrolment Services and get sent their Centrelink letter. In case of changes to their enrolment whilst abroad, they contact the International Office who sends the revised information to Enrolment Services to make the relevant amendments.

**Victoria University**

• Students must have a 60% average and submit 2 references plus a completed and signed study plan.
• Applications are assessed at the deadline, data entered and students are emailed.
• Partners are contacted for the number of places available, then students are offered places and complete the host institution forms.

**Monash University**

• Deadlines are twice per year. The application is in paper form.
• 60% is the average mark required but this is higher for some host universities, such as Kings. The emphasis is on students doing the research and taking responsibility for their program.
• Monash University Abroad contacts partner to check on capacities before allocating places.
• The University has regular contact with students before the pre-departure session.

**Griffith University**

• The GPA requirement is 4.5 / 7.
• 2 references and a statement are also required.
• Study plans are approved by Faculties as part of the application process. Students are encouraged to get lots of subjects approved.
• Once students are allocated a place, they are provided with host application forms. These are sent back to the host ‘blind’ (i.e. with no approval of number of places available) if there is no problem with numbers.

**Swinburne University of Technology**

• The university has two deadlines – an early ‘priority’ deadline and a late one. The first round assessments happen after first ‘priority’ deadline. Applications for the late deadline are processed as they come in.
• Students are expected to have an average of 65 / 100 or higher. Students under this might receive a ‘Conditional offer’.
• Students must have completed 8 units by the time they go, and submit a statement, copy of their passport, 2 academic references, and an approved study plan.
• The team conducts application workshops, which are well attended and well structured. Students have to register online, meaning that the team is able to monitor the ‘pipeline’ of students. The team has a similar process of online registration for information sessions.
• Students have to sign an acceptance of their offer, which has to be witnessed and includes a section on student conduct. There is something similar on scholarships – students have to formally note when they will assist in the office once they get back – they have to give 2 hours.

**University of South Australia**

• Criteria are academic merit (4.0 / 7), no more than 2 fails, full year of study completed and academic recommendation.
• Deadlines are in August for semester 1 and in January for semester 2.
• Online application form: 3 preferences, recommendation letter from professors.
• When students apply online they enter the name of a referee and their email address. That person automatically gets an email asking for a reference for the students – their reply goes back to the generic exchange email address.
• Students get a letter of acceptance including what funding they can expect to receive. They must then attend a mandatory info session.
• Students get a very comprehensive guide to student exchange. This covers visa info and all the other stuff students have to go through between acceptance and departure. The booklet is also available on the website.
• Once they are accepted by their host institution students sign a contract / agreement.
• Students then get subject approvals, which are verified by the International staff to make sure they are appropriate.
• Once abroad students get enrolled by ‘Campus Central’ after subjects are approved and everything is ticked off.

**University of Queensland**

• The University of Queensland has a checklist for students to work out where they are up to in their program application and preparation process.
• The University has a simple paper application form. The study plan must be completed / approved prior to the application being lodged.
• The faculty sends an ‘approval letter’ to students outlining where they are up to in their degree and what will be left after they get back from exchange. A copy is also sent to the mobility team.

**University of the Sunshine Coast**

• Not all partners are offered each semester.
• Students download the application form from an internal site. The faculty needs to approve the student’s study plan before the application is finalised.
• The application is handed in with 2 academic references, a statement and transcript (mark required is 4.5 / 7).
• The Dean of the relevant faculties has to approve each student. Students are then notified with a letter of offer.

**The University of Adelaide**

• Credit average required.
• 1 year of study required.
• Rolling admission.
• The university runs two information sessions per week (Tues/Thurs), plus drop in times between 10–2 pm on Tuesdays and Thursdays. Students can’t apply or ask for a meeting until they’ve been to an information session.
• Students apply online via a fill-in PDF, which is about to become a web-form.
• All students are met 1-to-1, either before or after they apply but before they are selected.
• Students must sign conditions of participation.
• Students are sent an offer – if they accept it they get sent more information on applying to their host university.

Queensland University of Technology

• The university has started a series of Exchange 101 seminars – 5 per semester following the Exchange Fair and leading up to the deadline. Attendance is not required but the feedback is positive. Students register for this session online.
• Students apply online via the SEMS system (see Section F: Using Technology).
• There are 3 exchange 102 sessions for people who have been told they are eligible.
• A process manual on mobility is currently being written.
• Students’ study plans are loaded into SEMS. Students are responsible for inputting their study details and program selections into the system and their online study plan becomes their learning agreement.

University of Canberra

• There are 2 deadlines per year but the university is willing to accommodate students where possible.
• The application is in paper form – reference, transcript, 4.5/7 average, statement, photo, financial statement (what students expect to spend, how much they have etc, what it will cost them).
• Students are interviewed before being placed.

Murdoch University

• There is 1 deadline per year on 30th August.
• Students can email in the application form or drop it in at the Student Centre. Hard copies of the form can be collected at the Student Centre.
• 2 references both academic, and a personal statement are required, as well as a 1.6 GPA (4 point scale where 1.0 is a pass and 2.0 a credit). Students have to have credit transfer signed off as part of the application.
• Students are sent acceptance letters by email.

The Australian National University

• 2 application rounds per year. Deadlines are on 1st May for semester 1 and 1st September for semester 2.
• Students must have completed a full year at time of application and hold a GPA of 5.
• If all of a student’s choices of institution are full, the university offers the student a place at an institution they haven’t even chosen. This is becoming more and more common.
• The application is online and students can’t get the link until they have been to an information session and have provided their details.
• Students are given one week to accept their offered institution. They then must attend a nomination session to talk about the process, where they are given the relevant forms etc.

**Curtin University of Technology**

- Deadlines are 1st July for semester 1 and 7th January for semester 2.
- Requirements: 60 Weighted Average Mark, no fails (unless there are extenuating circumstances), 1 reference, statement.
- Capacity exchanges – places are allocated on a first come, first served basis.
- Students complete all documents given to them at the information session, plus transcript.

**Deakin University**

- Students with an average mark underneath the required exchange criteria must have an approved plan for how they are going to improve their marks prior to going on exchange. The plan is discussed with, and approved by, an academic skills advisor. Since implementing this not a single student has been rejected by a partner for having grades that were too low.

**The University of Western Australia**

- The University of Western Australia has numerous checklists to ensure consistency of service. A checklist outlines the points to raise with students and the questions to ask them during an appointment.
- The University has also set up a new process for students who want to go on independent outbound Study Abroad.

**University of Technology Sydney**

- Deadlines are 15th December for semester 2 and 24th June for semester 1.
- Acceptance procedure: Students complete the form including personal statement and 5 choices of universities with direct equivalent subjects for all 5 choices – if they are electives they can just list subjects – students no longer need outlines for electives, only for direct equivalents (see Section R: Credit and Acknowledging Experiences).
- Applications are signed off by Faculties, which includes subject approvals.
- Places are allocated based on Weighted Average Mark. The university finds students are increasingly going to second and third preferences.
- Students are sent an offer by email - they then must accept that offer by a specified deadline.
- There is then a ‘Post-nomination meeting’ – group sessions based on countries and universities to go through application process for the host university. Students are provided with forms, deadlines etc.

**Charles Sturt University**

- Deadlines are July 1st for semester 1 and December 1st for semester 2.
- Students are directed to their Course Coordinators to check for the best time of in their degree for them to go overseas. Once confirmed, students look at the list of partners to make choices.
- Students then complete the Charles Sturt University Global application form and the host institution application form at the same time.
- Other attachments are: Copy of transcript, Statement of purpose, Budget. Depending on where they are wanting to go they also need to supply their bank statements, medical documents, etc. at the time of application. Their application form also has the Conditions of Participation in it.
• Students applying for DIISRTE scholarships are interviewed, as is any student with a GPA below the 4.5/7.0 requirement.

• Students then get sent a formal letter of offer: forms to sign (acceptance into program, media release, plus form relating to their travel grant) and the partner application forms get sent off.

**RMIT University**

• Deadlines are June 30th for semester 1 and December 30th for semester 2.

• There is a 4–6 week turnaround internally followed by the application process the host university after that.

• Some schools ‘pre-nominate’ students for particular partners.

• It is compulsory for students to attend an information session – there are 11–12 of these per semester. They are held at different times including after hours and on the different campuses.

**University of Western Sydney**

• Deadlines are June 10th for semester 1 and November 10th for semester 2.

• The application form is now only available once students have been to an information session (which they have to register for). Students can download a podcast if they can’t make it.

• After the information session, students research their choice of universities and then book in for an Advisor Consultation after that.

• They hand in a paper-based application form including a reference.

• Once accepted by University of Western Sydney, students complete the credit transfer form for the university they’ve been nominated for with their Head of Program.

**Macquarie University**

• There are two deadlines per year, essentially 6 months before exchanges take place.

• Applications are assessed – GPA 2.5/4, must have completed a year at Macquarie University (excluding pathway programs), demonstrate that credit overseas will count towards their degree and that they shouldn’t be extending their degree by being overseas.

• International students cannot go back to their home country.

• The Student Exchange Committee decides who is accepted and which university the students will go to: the committee includes the outbound manager, Dean of Students, a representative of the Coursework Studies Committee and the International Studies Convenor.

**The University of Newcastle**

• Deadlines are July 31st for semester 1 and January 31st for semester 2.

• In 2011 the university trialled locking students in for places at particular universities early if they’re eligible, which proved effective.

• The university makes extensive use of their online Learning Management System to provide students information (for more details on this see Section F: Using Technology). The online information requires students to do a pre-assessment of their eligibility before they can apply online via SurveyMonkey.

• Once the assessment of applications is complete, students receive an email telling them they’ve been accepted. They are then referred to the LMS to look at a list of where they’ve been accepted to go. They are able to accept their place or withdraw – if they accept they have to go through an online pre-departure, hosted on the LMS, and complete a SurveyMonkey quiz in order to accept their place.
• Students have just over a month to get their overseas application together into a portfolio. All the information and forms for each institution is online on the LMS. They are required to bring this in and attend a pre-departure interview. Assuming everything is in order, the International Office stamps and signs it the application then students are required to send their application to the host themselves.

• At this point students need to seek credit approval – as part of the online quiz in the previous step they had to look up the person responsible for approving this.

The University of New South Wales

• Deadlines are end of May for semester 1 and mid-October for semester 2.
• They run 3 information sessions per week and students must attend one in order to apply – it is at these sessions that students get their application.
• If students have more than one fail they must have a very good reason as to why they should participate.
• Students choose six institutions as preferences and are advised that they should be ready to attend any one of those six. Students initially seek approvals for courses at their first preference institution.
• Students apply online but they then print the document, sign the declaration, attach all other relevant documents (including their receipt for their deposit – see ‘Deposits’) and submit the hard copy.
• Amongst other things the application asks for evidence of finances, resumes, the receipt for their deposit, a reference, and the front page of their passport.
• Students have to choose, and have approved, 8 subjects for their first preference university. If they don’t get their number one choice they have to go back to get more approvals.
• At their pre-departure session students complete their enrolment forms and student agreement. Afterwards they are posted their proof of insurance letter and ‘verification’ letter (i.e. letter for Centrelink).

Southern Cross University

• Southern Cross University’s Application Form is very comprehensive. This form and application should be becoming an online application soon.

Case Study: Southern Cross University Exchange Application Form
Additional Related Resources:

- **Checklist:** Edith Cowan University Exchange Checklist
- **Checklist:** The University of Western Australia Interview Checklist for Non Standard Applications
- **Policy:** The University of Western Australia Application Declaration
- **Checklist:** The University of Western Australia Next Steps After Applying for Exchange
- **Policy:** The University of Western Australia Conditions of Participation
- **Template:** The University of Western Australia Youth Allowance Letter
- **Case Study:** Edith Cowan University Student Exchange Application
- **Template:** Deakin University Exchange Application
Outbound Mobility Best Practice Guide for Australian Universities

Section N:
Establishing
New Mobility Projects

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas.

Section N draws heavily on the Department’s 2010 VET Outbound Mobility Toolkit. The information from the Toolkit used here has been revised and updated as necessary for use in this Guide.
This section contains tools and tips for establishing new outbound mobility projects. A project might be a study tour, an internship opportunity or service learning (volunteering) project.

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• Services Required from a Service Provider
• Post-It Note Planning
• Draft Project MOU Policy
• Outbound Mobility Project Plan Template
• Short Term Programs Operational Plan (Charles Sturt University)
• Project Budget Template
• Bilateral Business Councils Reference Tool
• Sponsorship Proposal Template
• Securing Sponsorship Checklist
• Communication Plan Template
• Partner Communications Log Template
• Partner Institution Fact Sheet Template
• Press Release Template
• Itinerary Template
• Key Factors to Consider when Planning Overseas Study Tours Reference Tool
• Student Management Process Template
1. Project Planning

1.1 Planning a Project – General Overview

An outbound mobility project might take the form of a:

- Long term Exchange Program (semester or longer)
- Short term exchange program
- Study tour
- Service learning (volunteering) project
- Internship or work placement
- Individual/Group Project
- Conference/Delegation.

A project might originate from a range of different contexts, such as:

- a visit by delegates of an overseas institution
- a conference
- a request of senior management
- an academic’s personal contacts
- a strategically planned process.

Depending on what your project is and where it has originated from you might be required to adapt your approach slightly from the steps outlined below. In all cases, however, thorough planning (whilst it may be time consuming) allows your university to mitigate risks and put thorough processes in place for students and partners. Inevitably this will result in better experiences for students and partners and allows for easier reporting on outcomes.

See Section 3 for information about Developing a Project Plan

1.2 The First Steps in Implementation

Irrespective of the project, there are some steps that must be completed as part of every project plan.

- Developing your project team (See Project Team)
- Due diligence on partner (See Section H: Partnerships)
- Legal issues – contracts / MOUs (See Section H: Partnerships)
- Health and Safety evaluation (See Section I: Risk Management)
- Evaluation of student demand (See Measuring Demand)
- Deciding on what marketing channels to use (See Section O: Promoting Programs)
- Considering credit possibilities (See Section R: Credit and Acknowledging Experiences)
- Evaluating what budget and resources are required (See Budget and Resources)

See also Developing a Project Plan
### 1.3 Specific Steps for Different Types of Projects

Each type of project below may require extra planning in the respective:

<table>
<thead>
<tr>
<th>Project Type</th>
<th>Additional Planning Steps Required</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Long term Exchange Program</strong></td>
<td>- Site visits (See Section H: Due Diligence / Site Visits)</td>
</tr>
<tr>
<td><strong>(Term / Semester or Longer)</strong></td>
<td>- Agreement on processes with partner organisations</td>
</tr>
<tr>
<td></td>
<td>- Identifying most appropriate programs and map curriculum for chosen long term exchange time period</td>
</tr>
<tr>
<td></td>
<td>- Reciprocity and balance – How to achieve reciprocity and balance</td>
</tr>
<tr>
<td><strong>Short term Exchange Program</strong></td>
<td>- Site visits (See Section H: Due Diligence / Site Visits)</td>
</tr>
<tr>
<td></td>
<td>- Agreement on processes with partner organisations</td>
</tr>
<tr>
<td></td>
<td>- Reciprocity and balance – How to achieve reciprocity and balance</td>
</tr>
<tr>
<td><strong>Study Tour</strong></td>
<td>- Site visits (See Section H: Due Diligence / Site Visits)</td>
</tr>
<tr>
<td></td>
<td>- Sustainability – How to avoid burning out staff</td>
</tr>
<tr>
<td></td>
<td>- Role of Service Providers (See 1.4 Using Service Providers)</td>
</tr>
<tr>
<td><strong>Service Learning (Volunteering) Project</strong></td>
<td>- Criteria for choosing an appropriate service-learning destination</td>
</tr>
<tr>
<td></td>
<td>- Role of Service Providers (See 1.4 Using Service Providers)</td>
</tr>
<tr>
<td><strong>Internship or Placement</strong></td>
<td>- Sustainability – how to retain and / or incentivise industry partners to continue to take students for internships or placements</td>
</tr>
<tr>
<td></td>
<td>- Role of Service Providers (See 1.4 Using Service Providers)</td>
</tr>
</tbody>
</table>

### 1.4 Using Service Providers

Service providers are organisations based either in Australia or overseas that can assist with the development and implementation of projects and programs.

Types of service providers include:

- Travel agents
- Austrade
- Study tour developers and short term program providers
- Service learning (volunteering) program providers
- Internship providers
- Professional Conference Organisers
- Other companies assisting with the organisation of logistics (e.g. bus companies, airlines etc).

Using service providers can be an excellent way to efficiently implement extra mobility options or relieve the logistics burden of arranging, for example, study tours. As there is a cost involved, you need to weigh up the advantage of using a professional organisation to organise parts of a program as opposed to arranging it yourselves.
A few rules about working with service providers:

- **Decide on what you need**
  Before contacting a service provider, try to have an idea of exactly what you need them to do. In the simplest case, this might just be having them book flights for you or arranging transfers. In a more sophisticated example it could involve them arranging all the logistics and visits as part of a study tour.

  Be realistic about your capacity to organise the project and decide on where, if at all, you might require the services of a provider.

- **Be explicit**
  You should try to be as clear as possible as to what services you expect provided.

  You can use this Service Provider Checklist tool:

**Checklist:** Services Required from a Service Provider

- **Legal Issues and Due Diligence**
  Do you need an MOU or service agreement?

  If you are only booking flights with a service provider then possibly not, but if the relationship is more complex then an agreement may be prudent.

  If the organisation is a travel agent, be sure to do your due diligence. Australian-based travel agents should be registered with the Traveller’s Compensation Fund – search at [http://www.tcf.org.au/](http://www.tcf.org.au/). If they are a travel agent and are not registered with the TCF, ask them why they are not.

- **Payments**
  You should agree with your Provider in advance as to how and when payments need to be made. It may be that students pay directly to the provider or that they make payments to your institution and you then pay for the services provided. Put this in writing (by email is okay) so that both you and your provider are clear on when certain payments will be made.

- **Act Early**
  It takes time to get arrangements in place and for providers to complete the work that you require them to undertake. Think ahead and act early.
2. Measuring Demand

Before launching any new mobility project or program it is critical to have an understanding of the level of demand from students for the opportunity.

Remember: **No demand = No students = No project!**

Here are some ways to measure student demand for outbound mobility opportunities.

**a. Ask academics if you can gauge interest during classes**

The most straightforward way to quickly and easily ascertain interest in a project is to do some ‘class visits’ to talk to students. This involves pre-arranging to have five minutes prior to the beginning of a class to introduce students to the key ideas for the project.

During these five minutes you might address:

- Where the project goes to
- What is involved and how long it might run for
- The sorts of credit or acknowledgement they might receive
- A broad estimate of cost.

At the conclusion of this ‘mini pitch’, take two minutes to ask students, by show of hands, who might be interested in such an opportunity. Record the number of students in the class and the number of students expressing interest. You might also take the time to ask the students if they have any questions, concerns or comments – these can be very useful in helping you shape your project.

Once you have visited 2–3 classes you are in a position to determine an overall ‘level of interest’. You do this by:

1. Determining the proportion of students interested across the classes you’ve visited (total no. interested students ÷ total no. students in the class)
2. Multiply the total student cohort for the area of interest (e.g. business students) by this proportion.

**Example**

Across 3 business classes, 28 out of 46 students (or 61%) expressed a possible interest in the program. There are 400 students in the business cohort, so 243 is the estimated total level of interest in the project.

Given this total ‘pool’ of interest, it is important to bear in mind that there is a very large number of students (50% or more, anecdotally) who might express initial interest without having any real prospect of being able to participate. You must consider whether your ‘pool’ is large enough to comfortably fill your project.

A realistic figure would be around 10–15% of students expressing the very broad, initial interest in a project actually having the capacity to undertake it in future. From the example above, this would give you a realistic potential pool of 25–40 students for your project.

You must finally determine whether this final number of potential students is high enough to justify the time required to set up the project.

**b. Broad email to students asking for expressions of interest**

A bulk email out to relevant student groups is a very quick way to gauge interest in a program, but also less reliable than visiting classes. Whilst emails can reach a large audience quickly, it can be difficult to evoke responses.

If you are going to ask for Expressions of Interest you may wish to consider using an online survey tool. One of the popular tools is called ‘SurveyMonkey’ ([www.surveymonkey.com](http://www.surveymonkey.com)). Online survey
tools can often be used free if you are only undertaking basic functions, and are a sophisticated way of getting information from interested students.

Some of the key questions you should ask are:

- The student’s name, email address and phone details
- The student’s current program of study, how far through they are
- Any concerns the student has about participating (costs, getting time off work etc) – this can be a tick box option and helps you estimate the likelihood of them being able to participate
- An agreement that you can use their contact details to provide them further information about the program.

c. Student focus groups

In an ideal world it would be possible to focus-group potential new programs with students. The reality is that time constraints will almost always prohibit this from being possible.

If you do get the opportunity to conduct a student focus group, some of the areas you could concentrate on are:

- What aspects of the program are most appealing?
- What things might deter the students from participating?
- What kind of outcomes are they looking for? Is it credit? An extra certificate? Something else?
- What is the best time of year for them to participate (is it during a particular holiday period?)
- What are the most appealing destinations to them? (Bear in mind that students may not be aware of the fact an exchange or study tour in a non-English speaking country may be possible in English).

In asking questions around all of these topics your objective should be to try and determine:

1. That the proposed project is viable
2. The positives and negatives about the destination, proposed project, timing and duration
3. Reactions to proposed cost
4. What messages might speak most to students and encourage them to participate – is it the destination, the field trips, the friendships or the certificate they get at the end? Any of these might be the reason that students want to participate.
3. Developing a Project Plan

3.1 Tools for Project Planning

Your project plan will involve many different aspects, many of which are covered in more detail in the following sections.

As a minimum, things you need to do as part of your program planning are:

- Consider the resources you have available (See Budgets and Resources)
- Select your project team (See Project Team)
- Undertake risk management assessment (See Section I: Managing Risk)
- Liaise with stakeholders (partners, media, internal stakeholders) (See Communication with Stakeholders)
- Plan your itinerary (See Planning an Itinerary)
- Implement your program
- Evaluate your program (See Section Q: Re-Entry).

A useful way to complete this sort of Project Planning is to complete ‘Post-It Note Planning’. Read more about this in this document about Post-It Note Planning:

Reference Tool: An Introduction to Post-It Note Planning

An alternative to Post-It Note Planning is to use this Outbound Mobility Project Planning Tool, which divides projects into 4 sections: Policy development, Project Preparation, Project Delivery and Finalisation. It can be used to identify tasks that need to be completed as part of the project, the person who needs to complete the task and a timeframe for delivery.

Template: Outbound Mobility Project Plan

For short term programs, consider using Charles Sturt University’s excellent ‘Short Term Program Operational Plan’

Template: Charles Sturt University Short Term Program Operational Plan

Once you are ready to run a project with a partner, you may wish to sign an MOU or Contract with them.

Here is a template MOU for a mobility project (you should consult your legal service if you wish to create a contract with another organisation).
3.2 Timelines for Project Planning

Different types of programs take varying amounts of time to establish. Always be sure to leave sufficient time for projects to be implemented – things like arranging logistics, generating student interest and preparing students for departure inevitably take longer than expected.

Below is a table with recommended implementation times for new outbound mobility projects. These timelines show the amount of time suggested from the conception of a new project through to the time the first student participates. They take into account: setting up relevant partnerships, signing agreements, organising logistics, generating student interest and preparing the student/s for departure.

<table>
<thead>
<tr>
<th>Project Type</th>
<th>Recommended Minimum Implementation Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long term Exchange Program (Term / Semester or Longer)</td>
<td>18 months</td>
</tr>
<tr>
<td>Short term Program</td>
<td>12 months</td>
</tr>
<tr>
<td>Study Tour</td>
<td>12 months</td>
</tr>
<tr>
<td>Service Learning (Volunteering) Project</td>
<td>6 months</td>
</tr>
<tr>
<td>Internship or Work Placement</td>
<td>6 months</td>
</tr>
<tr>
<td>Conference</td>
<td>6 months</td>
</tr>
</tbody>
</table>

For example, if it is the month of June, the first participants on a new short term exchange program should only be departing in June or July of the following year.
4. Budget and Resources – Costing and Funding Projects

4.1 Preparing a Project Budget

Not to be confused with Section C: Budgets and Finance, or Section G: Funding – Scholarships, Grants and OS-HELP.

Project budgets are useful to calculate how much students should be asked to pay for a particular experience. They allow you to calculate fixed costs (such as staffing costs, per diems, the cost of doing site visits to establish the project, and even office costs) as well as variable costs – such as those that a student is likely to experience whilst abroad.

Download the Project Budget spreadsheet tool:

Template: Project Budget

This tool is particularly useful because, once configured, it allows you to ‘balance’ the budget for the project by either increasing the fee the students must pay or increasing the amount of money your organisation needs to commit to the project.

4.2 Dealing with Currency Exchange Rates

One of the perils of running outbound mobility projects is variation in currency exchange rates, specifically when you have suppliers or partners that you need to pay in foreign currency.

A few tips for dealing with foreign currency:

1. **Determine an Exchange Rate**

   An excellent website for currency calculations is oanda.com
   (http://www.oanda.com/currency/converter/)

   Oanda allows you to calculate exchange rates based on today’s rate, or any historical rate.

   When calculating a rate, you should never use the ‘interbank’ rate – this is the rate that banks charge each other to convert currency. The ‘real’ rate that individuals and businesses have access to is usually between the ‘credit card’ rate (which is equal to the Interbank rate + / – 2%) and the ‘cash’ rate (which is equal to the Interbank rate + / – 4%).

2. **Give yourself Room to Move**

   Currency can fluctuate greatly from day to day and week to week. Always give yourself room to move by being ‘pessimistic’ about what is going to happen to the currency value. Calculating an extra 2–4% of possible variation gives you some flexibility – thus using the Interbank rate + / – 8% is not an unreasonable option.

   In the situation that currency remains stable, or changes in your favour, this additional amount can be either returned to students or used to offset other costs in the budget.

Remember that if you have to make payments in foreign currency your finance section will either need to generate a foreign money order or make a foreign telegraphic transfer. These take longer to process than regular payments, often by up to a week or more, so you should be extra vigilant of invoice due dates.
4.3 The Importance of Scholarships and Travel Grants

AUfIDF benchmarking states that the provision of scholarships / travel grants is sufficient to increase mobility, although it is not necessary as there are two universities that manage to send significant proportions of their students overseas with limited funding.

However, there is a strong correlation between the offering of financial support to students to undertake outbound mobility projects and increasing uptake of those opportunities.

More scholarships / grants generally equals more students undertaking outbound mobility projects.

Convincing senior management that student mobility scholarships are valuable can sometimes be challenging, despite the institutional benefits of having a student mobility program.

4.4 Seeking Sponsorship

There are many organisations that may have an interest in funding outbound mobility projects. Travel agents, airlines, bilateral business councils (such as the Malaysia-Australia Business Council), and tourism, cultural and educational organisations of foreign Governments all have interests in seeing more Australians travel abroad for education. These are all potential sources of funding or sponsorship.

In seeking sponsorship you need to carefully think about two factors: which organisations have an interest in seeing your students travel abroad, and what’s in it for them if they provide you with sponsorship?

You might be able to entice sponsors by offering to promote their services to students around your organisation in return for cash or in-kind support.

Corporate Sponsorship

Sponsorship can help provide funds in addition to your budget to support an initiative. You must remember that sponsorship must be a mutually beneficial partnership to be effective and sustainable. Companies only respond positively to a cause if they can see the merit in it and see that they are going to get something in return.

Seeking corporate sponsorship is one area.

Tips to Secure Sponsorship

1. Target companies with an interest or affiliation in your initiative. Don’t randomly send letters, rather research relevant companies and identify possible linkages and synergies between your programs and theirs.

2. Have a clear description of what’s in it for them. Be sure that you provide them with value for their sponsorship. This could include free advertising on promotional information, mention at special events and in press releases, etc.

3. Create levels of sponsorship. This gives you more scope to generate funds and allows more organisations to be involved. A common approach is to create a Gold, Silver and Bronze category with varying levels of incentives. Ensure that this is fair and reasonable.

4. Provide a response form so that potential sponsors can act quickly and easily.

5. Follow up. A few days after the potential sponsor has received their letter you should follow up with a phone call. Be prepared to resell the idea to them, outlining the linkages between your program and their organisation.

The attached sponsorship letter and template is there to assist you in approaching corporate partners. You may wish to refer to this checklist for seeking sponsorship and this sponsorship proposal template.
Bilateral Business Councils

The attached reference tool includes the links to the major bilateral business councils that support trade and international cooperation between Australia and their respective markets. Business Councils may vary in structure and scope but generally operate under a state chapter system that enables its members to network and attend information sessions and trade related programs with like-minded organisations and individuals in their state.

For access to companies based in countries with bilateral business councils, or those doing business in the region, the business councils are a great place to start. Membership fees vary across councils but most have a low entry option for just individual membership.

Note that the bilateral business councils are different to the bilateral councils / institutes funded through the Department of Foreign Affairs and Trade who each fund small grants for a range of projects and programs (including exchange and international collaboration) between Australia and their respective markets.

4.5 Student Fundraising

Encouraging students to undertake fundraising for their project is a good way to build both team camaraderie (in the case of group projects like study tours) as well as awareness of a university’s outbound mobility program.

Some fundraising activities students might undertake include:

- Selling chocolates around your institution
- Running a quiz night
- Running a BBQ at lunchtime
- Running a competition for a prize donated by a sponsor

Charles Sturt University provided an example at the 2011 Outbound Mobility Forum of how one of their outbound groups was able to obtain some funding from the local IGA supermarket. Regional institutions might be able to use their closer linkages with local communities to their advantage in this regard.

4.6 Travel Grant Policies and Applications

See Section G: Funding – Scholarships, Grants and OS-HELP
5. Project Team

5.1 Roles on a Project Team

Outbound mobility projects can often cut across several sections of a university involving International Offices, other professional staff, finance, legal and communications teams, academics and even senior management.

Planning who is going to be involved, and understanding what their role will be, will help you to be efficient and thorough in implementing the project. The table below outlines different ‘positions’ that people might have and what their role in a mobility project might be. This will vary significantly depending on your level of resourcing. The list of roles is not extensive.

<table>
<thead>
<tr>
<th>Position</th>
<th>Potential Mobility Project Role</th>
<th>Level of Involvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td>Assisting promotions</td>
<td>Low</td>
</tr>
<tr>
<td>Academics</td>
<td>Promotions; site visits; designing project content; assessment; assisting to prepare students;</td>
<td>High</td>
</tr>
<tr>
<td>International Office / Professional Staff</td>
<td>Managing applications; arranging logistics; student administration and preparation.</td>
<td>High</td>
</tr>
<tr>
<td>Project Manager</td>
<td>Quality Assurance; student selection; logistics; partner liaison; agreements and finance;</td>
<td>High</td>
</tr>
<tr>
<td>Communications</td>
<td>Public relations / media</td>
<td>Low</td>
</tr>
<tr>
<td>Finance and Legal</td>
<td>Agreements; project payments; administering per diems and advances</td>
<td>Low</td>
</tr>
<tr>
<td>Senior Management</td>
<td>Meeting partners; provide resources – funding or staff time; endorsement</td>
<td>Medium</td>
</tr>
<tr>
<td>Travel Agent</td>
<td>Approved travel provider and in accordance with travel protocols</td>
<td>Medium</td>
</tr>
</tbody>
</table>

5.2 Communication Between your Project Team

Your team should communicate often and meet frequently.

One member of your project team should act as a sort of ‘secretariat’ for the project. This role, often served by an administrator, involves organising and minuting meetings, collecting, collating and circulating relevant documents and managing project timelines (see Developing a Project Plan).

This project ‘secretariat’ becomes the central contact point for anyone inside your university who has an enquiry about the project.
6. Communication with Stakeholders

6.1 Developing a Marketing and Communications Plan

Preparing a marketing and communications plan for your outbound mobility initiatives will help to ensure you have the most appropriate programs and are targeting the right students and destination markets.

When preparing a marketing and communications plan for your outbound mobility programs you should consider and refer to your organisation’s strategic marketing plan to ensure it is aligned.

Template: Communication Plan

6.2 Internal Communication

Internal communication about your project should largely be managed by your Project Team – see 5. Project Team.

6.3 Communicating with Partners

Training providers should endeavour to remain in close contact with overseas partners during the establishment, implementation and evaluation of projects. This is most often via email and telephone (or Skype), but meeting with partners at International Education conferences or during site visits (Section H: Partnerships / Site Visits) is also extremely useful.

You can use this Partner Communications Log to keep track of contact that you’ve had with your Institutional and Industry partners.

Template: Partner Communications Log

Storing Information about Partners

It is important to ensure against the loss of corporate history by documenting information about partner organisations as well as possible.

This might involve keeping a Partner Communications Log as well as developing a Partner Institution Fact Sheet, this document is particularly applicable to long term exchange programs but can be adapted for short programs. Fact sheets are easily updated and are very useful to give students a quick impression of what an Institute or destination is like.

Template: Partner Institution Fact Sheet
6.4 Generating Media Interest

Your university will no doubt have its own processes and systems for generating media interest. The following section provides some general tips about managing public relations of a mobility program and effectively getting access to mainstream media.

Public Relations – Tips for Effective Press Releases

A well-prepared press release can get you free publicity. Your story may also be better received if it appears in the editorial or news section rather than in paid advertising. The aim of the press release is to gain the attention of the media and encourage them to share the story with others through their media channels.

The Elements of a Good Press Release

- It is to the point
- It has a significant impact on others
- It is timely
- It offers a unique or different perspective on a topic; it is new or unusual; there’s a human interest component (e.g. people, children, animals)
- It highlights organisational or individual achievements
- A well-known person is involved
- There is a local angle (related either to a neighbourhood, city, region, state, or nation) or
- It is related to a subject about which people always want to learn more

Writing a Good Press Release

- Write down all the points relating to your story. Explain the WHO, WHAT, WHERE, WHEN, WHY and HOW of your story
- Place your points in order of importance – from the most important to the least. Your first few points should clearly explain the basics of your story
- Look for a unique angle or point of difference that may make your story more interesting or attractive.
- Look for a ‘human’ angle that makes the story personal
- If you have a relevant and interesting photo you should include it
- Consider if there is an opportunity to invite the media to a special event to interview key people and / or get a photo
- Use clear and simple language, avoid jargon and acronyms and keep it short and to the point (one page is ideal).
- Use active words and quotes to make it positive and personal
- Ensure it is accurate and stick to the facts
- Consider the benefits to your audience – don’t just point out the features. Clearly state what’s in it for the user
- Check and re-check

Distributing your Press Release

Selecting the appropriate media is just as important as writing a good release. When selecting a media channel you should consider:

- Your local media
- Special interest media (such as Campus Review for education matters)
- Press releases should be sent to the relevant editor.
6.5 Key Messages

Highlighting the benefits of overseas experiences is very important in generating student interest in projects. Anecdotally, people working in outbound mobility know the overwhelmingly positive influence that their experiences have on students, so gathering testimonials from past participants is very important in generating ‘key messages’ to disseminate to both students and institutional stakeholders.

See Section Q: Re-Entry for more on testimonials

7. Planning an Itinerary

7.1 Things to Consider When Planning an Itinerary

Itineraries generally apply to shorter-term projects, including study tours, other short term programs and conference participations.

Shorter duration projects can be extremely effective in increasing mobility as students usually have fewer major barriers to overcome to participate. However, a short projects needs to be intensive experiences, both educationally and culturally, so there is pressure to be very thorough when planning the itinerary for such projects.

Read this list of key factors to consider when planning an outbound mobility itinerary:

Reference Tool: Key Factors to Consider when Planning Overseas Study Tour Itineraries

You can adapt this Itinerary Template:

Template: Itinerary

In planning your itinerary you may also wish to consider the role of 1.4 Service Providers in organising aspects of your project, particularly when it comes to logistics like transport and accommodation.

7.2 Visas

Where your program can go, and what participants can do, may be affected by the types of visas that your students are eligible for. You should research visas well in advance with the relevant consulate.

Lead times for passports should also be considered.
8. Student Management Plan

8.1 What is a Student Management Plan?

A student management plan is the step-by-step process for managing students through a project. In essence, it is your ‘master process’ for dealing with students, beginning at the ‘promotion’ stage and running right through to the student’s re-entry program and what happens when they become program alumni.

Student management plans allow you to provide a consistent level of service to every students applying to go on a project.

You may choose to have a student management plan for an individual project, or to have a program-level plan that covers all of your individual projects.

8.2 What goes into a Student Management Plan?

A student management plan should address the following areas:

- Marketing of the program
- Management of enquiries and applications
- Administration of applications
- Preparation of students for departure
- Administration of students whilst they are abroad
- Re-entry process and management
- Evaluation and reporting.

8.3 Examples of Student Management Plans

Here is a Template Student Management Plan that you can complete and use either for individual projects or as a program-level document that applies to all individual projects.

Additional Related Resources:

Template: Student Management Process

Template: Alternate Partner Institution Fact Sheet
Outbound Mobility Best Practice Guide for Australian Universities

Section O: Promoting Programs

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas
What’s in this Section?

How universities market their programs varies somewhat according to the demographics of their institution, the make-up of programs on offer and the resources available. Marketing channels can be split up into three different types: ‘Common’, ‘Used by Some’ and ‘Innovative’.

Most institutions will begin with ‘common’ channels before moving on to higher levels of complexity with infrequent and innovative approaches added to their mix.

1. Common Marketing Channels
   - Fundamental Recruitment Strategies
   - Class Visits
   - Information Seminars / Sessions
     ○ Variations on Common Practice for Information Sessions
   - Exchange Fairs
   - Online

2. Marketing Channels Used by Some Universities
   - Student Mobility Offices

3. Innovative Marketing Approaches

4. The Importance of Supporting Academic Champions

Additional Related Resources

Tools and Examples in this Section

- Exchange ‘Postcard’
- 1 page promotion for 1st year students
- Exchange Passport
- Exchange Promotion Postcard
- Facebook page
- Ten Steps Checklist
- Financial Assistance Document
- Photography Permission Form
- Discipline Specific Advising Sheet
- Course Specific Suggestions
- Information Session Powerpoint
- Case Study: Developing a Tagline and Promotion Campaign – exCHANGE YOUR LIFE.
- Exchange Student Advice Slide
- Great website – www.mobility.unimelb.edu.au
- Photo of University of the Sunshine Coast Billboard
1. Common Marketing Channels

As part of the survey for the Guide, 23 institutions responded to a question about the types of marketing activities that they undertake.

Which of the following promotional channels do you use? Select all that apply.

**Fundamental Recruitment Strategies**

As with any marketing, the keys to outbound mobility promotions are to be **visible** and **accessible**.

The most common promotional techniques Australian universities use are:

- Producing a brochure or flyer
- Doing talks at orientations for new students
- Running information sessions (see below)
- Doing class presentations (see below)
- Running exchange fairs (see below)
- Sending mass emails or using their Learning Management System (see ‘Online’ below)
- Putting up posters
- Participating at university Open Days
• Doing major promotions through their university websites, including banners on the home page, news articles
• Using Facebook (although evidence seems to be that the majority of universities do not spend a lot of time actively using Facebook)
• Holding ‘drop-in’ sessions (this is important particularly for those without a student-facing outbound office of ‘space’)
• Using a generic email addresses, like studyoverseas@university.edu.au
• Giving information to the domestic marketing team to present to high school students.
• Newsletters.

Class Visits

Class visits are one of the keys to outbound promotion. A university survey of students going on outbound programs revealed that 20% of students had first heard about it at a class presentation. This significant number suggests that a good class presentation schedule should have a positive impact on outbound numbers.

Most universities:
• Organise class presentations in advance with academics.
• Target big classes – particularly early in the semester or early in students’ degrees.

Some universities also:
• Use returned students to do presentations
• Use videos as part of their brief presentation
• Have academics do the presentation themselves, based on information and a slide (or more) provided by outbound mobility staff.
• Highlight particular partner universities, or program opportunities, depending on which class they are visiting.

The University of Canberra is an example of an institution that has mastered the use of class visits, doing 50+ class visits each semester to great effect. They have increased their outbound numbers by over 200%. Deakin University has also been innovative by having their Peer Advisors do the class presentations (see Section E: Staffing).

Information Seminars / Sessions

Whilst essentially all universities do information sessions, the volume and timing of these sessions vary greatly between institutions. One institution has tried doing 3 information sessions per week, though found it to be too resource intensive to be sustainable.

Information sessions work for some universities, but not for others. There is even variance across campuses of the same institution, suggesting that the effectiveness of information sessions depends on how they are promoted along with the demographics of the campus in question.

There is no set formula of number / timing of information sessions that is effective for everyone.

Universities generally acknowledge that information seminars are an excellent way of minimising email and telephone questions.

Many universities acknowledged the importance of advertising information sessions – they need to be either recurring frequently or thoroughly advertised. There is little point to running sessions with no or few students.
Variations on Common Practice for Information Sessions

- Several universities make it compulsory for all students to attend such a seminar before being able to book an appointment with an advisor.

- Some universities run panels with inbound / returned outbound students

- Queensland University of Technology calls its information session ‘Exchange 101’. They also have an ‘Exchange 102’ session for students who have been accepted to participate on exchange.

- Several universities require students to register online for information sessions and sign in when they arrive – this allows for effective tracking of ‘leads’. Several universities will not allow students to get a copy of the application form (or link to the online application form, where they have one) until they have been to a session.

- Some universities run their information sessions based on particular destinations (e.g. the US, Germany etc)

- The Australian National University sets some context to begin its sessions by telling students about the relationship between the institutions and how that relationship leads to the student having their exchange experience. The university also talks about balances and reciprocity etc so students really understand this concept.

- The University of Newcastle runs its outbound mobility information sessions in conjunction with its International Leadership program (iLEAD) info sessions. This encourages ‘cross-pollination’ of students between the programs.

- The University of Newcastle also covers pre-departure information at the end of every information session to reduce pre-departure questions and the need for a specific session

- Many universities consider the information session to be like a ‘drop in session’, so students can come by and ask questions at the end of the session. This proves particularly effective in reducing emails / other drop in enquiries when sessions are held regularly

- The University of Canberra has tailored posters for different faculty and degree groups

Read the outline of Queensland University of Technology’s Exchange 101 and Exchange 102 sessions here:

Checklist: Queensland University of Technology
Exchange 101 and
Exchange 102 Session Summaries

Topics to be covered in an Information Seminar should include:

- Where students can go
- How programs might count towards qualifications
- What funding (if any) is available
- The benefits of going on the program
- How the application procedure works
- Who is eligible to go on the program
- Time for Questions and Answers.
**Exchange Fairs**

The effectiveness of specific exchange fairs varies from institution to institution, and even campus to campus. Some universities do not hold fairs because they do not have the time to devote to promoting them.

- Several universities now call their fair an ‘Education Abroad Fair’ (or similar) and promote a range of programs outside exchange including: short programs, study abroad, practical opportunities (internships or clinical placements), volunteering, conferences, model United Nations etc.

- Most universities running fairs acknowledge the need to commit a significant amount of time and funding in order to generate a significant impact from their fair.

- Some universities offer generous support to selected partners in order to attend – this extends to paying for accommodation, and occasionally flights.

- At least one university asks students to pre-register for the Exchange Fair and gives away prizes based on these registrations.

**Online**

Electronic media provide an opportunity to promote outbound mobility in a highly efficient and well-targeted manner.

Numerous universities use the electronic space effectively to generate significant interest. The standout Outbound Mobility website is from the University of Melbourne’s Melbourne Global Mobility unit: [www.mobility.unimelb.edu.au](http://www.mobility.unimelb.edu.au)

Some of the key online strategies adopted are:

- Sending targeted bulk emails to specific student groups about selected exchange partners or program opportunities

- Using the university’s online Learning Management System (LMS) to store information about outbound and promote opportunities to students (see Using Technology)

- Running online webinars (online information sessions) for students who can’t attend in person

- Using Facebook

- Producing videos, photos and other appealing testimonial information for students

- Generating an ‘alias’ redirecting URL for the website. E.g. [www.university.edu.au/studyoverseas](http://www.university.edu.au/studyoverseas) – this redirects to the website and is easier to remember and promote than a longer ‘actual’ URL.

See also the section on Using Technology.
2. Marketing Channels used by Some Universities

There is a wide range of activities that some, but not all, universities adopt. Below is a non-exhaustive list.

- Bulk SMS to targeted groups – particularly promoting special events like exchange fairs or information sessions.
- Promoting opportunities on electronic noticeboards around campus.
- Getting articles in student publications.
- Edith Cowan University keeps a database of previous enquiries and uses this to try to attract buddies for inbound students as well as disseminating other promotional information.
- Several universities have developed their own outbound mobility 'brand', complete with logos, taglines etc. Many of these brands cover more than just exchange e.g. all education abroad opportunities.
- Several universities have prominent 'student mobility' office space on campus (see below).
- University of the Sunshine Coast has a postcard about their ‘GO Program’ that goes in the Offer Pack to all domestic students accepted to study at the institution.
- At Curtin University of Technology, the faculties do a lot of promotion, particularly those staff in the faculties that have a role related to outbound mobility.
- Some International Offices can’t send bulk emails, but manage to achieve the same result by asking their faculties to send out messages.
- Curtin University of Technology Business School has a video on its website from a returned student: http://www.business.curtin.edu.au/business/future-students/study-abroad/student-exchange-outside-australia
- At The University of New South Wales, relevant non-exchange opportunities (such as internships and short programs) are sent on to faculties to promote and are advertised on the student mobility blog.
- Several universities, such as The University of Newcastle, use the university screen savers in computer labs to promote outbound mobility.
- Several universities run specific targeted activities with the support of external partners or providers – for examples, University of Wollongong runs a ‘Canada Day’ with the Canadian High Commission, and Victoria University ran a ‘Mexico Week’ promotion with one of its partners from Mexico.
- Several universities have specific information sheets or resources for students from targeted disciplines. The University of Melbourne refers to these as 'Discipline Specific Advising Sheets' (DSAS) and notes that their introduction has 'removed a roadblock to student participation' (e.g. unclear information about credit and the best time to participate on exchange). Every new student receives an Academic Information Sheet showing how they could take a mobility program – customised according to program.
- Charles Sturt University posts all of the opportunities that they come across on their website so that students have access to them.
- University of Western Sydney has an internal staff notice and the outbound team uses it to send information to all staff.
- University of Technology Sydney has an active Exchange and Study Abroad Club – partially supported by the international office with administrative and financial support. The club provides a good avenue for marketing.
• Swinburne University of Technology runs info booths on its various campuses and these are manned by students who hand out flyers. At Victoria University a similar concept has been used for specific partners/countries – in one case generating 7 applications for a country where previously there had been no applications.

Student Mobility Offices

Several universities have prominent ‘student mobility’ office space on campus. Office space has the benefit of high visibility and easy access for students, though also has the challenge of maintaining staff hours.

There are many examples of drop-in office space. Some are:

Swinburne University of Technology has one of the standout drop-in office spaces – their office is highly visible, right adjacent to the train station where huge numbers of students access the campus.

Queensland University of Technology also has excellent office space close to the front of campus. They have pointed out that an A-Frame in front of their office would help to ‘direct’ more students.

University of Wollongong has an excellent physical location within Student Central, an area where lots of students need to go. They are highly visible with a good resource library. Students are able to take a ticket from a machine and wait to be served by a mobility staff member.

3. Innovative Marketing Approaches

Many institutions are being innovative in their marketing to students. Below is a non-exhaustive list of examples.

• Deakin University is looking at developing an information kit for careers counsellors and their domestic markets that has information targeted towards high school students.

• Swinburne University of Technology has marketing plans developed for UG, PG and VET students.

• University of the Sunshine Coast has done 3 videos with returned students – these are 3 minutes each and are to go on the website and be inserted into Powerpoint slides for academics.

• University of Wollongong does a targeted mailout after exams to students who are eligible for exchange.

• Edith Cowan University has a clever and visually appealing brochure that is formatted and shaped like a passport.
• Edith Cowan University works with one of its ‘marketing research’ classes from the business faculty. The class do a research projects for the mobility team – in the past they have looked at market demographics, barriers etc.

• The University of Queensland has thought about developing an online tutorial for exchange.

• University of the Sunshine Coast wants to be seen as the university gateway for local students to access incredible global destinations like New York or London.

• University of the Sunshine Coast has a billboard on the freeway not far from the university – this is paid for by the Marketing and Communication section.

• In addition, University of the Sunshine Coast’s main university promo video/ad has a clip of a student overseas and mentions study overseas as part of a USC degree. This was shown in cinemas, showed to schools etc.

• The Marketing/Communications team also does general stories with local media for significant events eg if DIISRTE funding is won.

• Murdoch University has commandeered flyer stands in the Student Centre and puts promotional material there about outbound opportunities.

• Murdoch University produced a flyer with the 6 main misconceptions about exchange – there was also a tear off section with the website details.

• Curtin University of Technology students wanting to apply, or coming to an information session for the first time, get a professionally printed folder containing the application form, unit approval form, reference form, conditions of participation and OS-HELP forms.

• Deakin University has mapped an international experience with every course: either an exchange, a Study Tour, internship or Virtual exchange. Mobility options are to be mapped out in the handbook for all faculties.

• At Deakin University, when business/law faculty students fill out their enrolment form they will now have to ‘opt out’ of a mobility option with business/law faculty, instead of opt in. This happens as part of enrolment when they sit with their advisors.

• RMIT University ran a successful photo competition and all the galleries on campus displayed the photos from students.

• At The University of New South Wales, the Careers section has a guide for first year students and one of the things in there is about going on exchange. Careers also does targeted promotion for outbound internships.

• The University of New South Wales promotes its outbound programs at the Careers, Volunteer and Internship Expo which has about 3000 students pass through in 2 hours.
• Southern Cross University wants to use inbound study abroad students to do presentations about their home universities.

• The University of Newcastle uses its Learning Management System to extraordinary success – outbound has some 5000–6000 students registered on its ‘Blackboard’ site. The site is self-enrolling and once students have signed up the International Office can email them and put up notices instantly. They can also segment lists and send targeted promotions to this group.

• The University of Newcastle leverages individual scholarships and opportunities extremely well – broad publicity of specific opportunities, like a special scholarship, helps to drive up general interest in all opportunities.

• Charles Sturt University has an outbound mobility postcard put in the materials that get sent out to all the Distance Education students.

• University of Western Sydney would like to put a podcast of their information session presentation online.

• Griffith University gives all outbound students a t-shirt and has some great photos and videos of students wearing them in different places around the world.

**Case Study:** Griffith University exCHANGE YOUR LIFE
4. The Importance of Supporting Academic Champions

Faculty members who are highly supportive of student mobility programs are generally known as ‘academic champions’. Institutions have an average of ten academic champions and they are seen as one of the most efficient and effective promoters of outbound mobility as they have constant interactions with students.

Committing additional resources to creating and looking after academic champions is a wise investment for universities interested in increasing mobility.

In the following table generated from a 2008 survey, international offices rated supportiveness from academics for ‘credit transfer’ and ‘supporting student mobility’ as more than 6.5 out of 10, but their support in ‘promoting student mobility’ was given an average rating of just 4.5 out of 10. This suggests that there is great scope for academics to be encouraged to promote mobility more, bringing it more into line with other areas of support for mobility.

Table: Supportiveness of academics in outbound mobility areas

<table>
<thead>
<tr>
<th>Average Rating</th>
<th>International office supports academic travel</th>
<th>No support for academic travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit transfer</td>
<td>6.8</td>
<td>6.9</td>
</tr>
<tr>
<td>Supporting student mobility</td>
<td>6.5</td>
<td>7.1</td>
</tr>
<tr>
<td>Promoting student mobility</td>
<td>4.5</td>
<td>4.9</td>
</tr>
</tbody>
</table>

Scale: 1 = not supportive 10 = extremely supportive

The table also shows that institutions that have international offices that support academics’ travel in some way enjoy significantly more support from academics. Currently a little over half of institutions contribute in some way towards academics’ travel, including providing funding (such as funding obtained through UMAP), arranging meetings and itineraries, providing contacts and other advice.

Supporting academics’ travel has a clear, positive impact on their supportiveness for outbound student mobility.

Additional Related Resources:

Case Study: Murdoch University Course-Specific Exchange Destination Suggestions List

Case Study: Murdoch University Exchange ‘Postcard’ Promotion Tool
Case Study: Murdoch University First Year Students Campus Promo

Case Study: University of Melbourne DSAS: Discipline Specific Advising Sheet

Case Study: University of Wollongong Exchange Promo Postcard

Checklist: The University of Western Australia ‘Ten Steps to Becoming an Exchange Student’

Case Study: The University of Western Australia ‘Financial Assistance Available’ Fact Sheet

Case Study: Murdoch University ‘Tear Off’ Promotional Poster

Case Study: Murdoch University Information Session Outline
Section P: Pre-departure Preparation and Whilst Abroad

Outbound Mobility Best Practice Guide for Australian Universities

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas
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   - Vaccinations .................................................................... P:2
   - Finances .............................................................................. P:2
   - Language and Intercultural Skills ...................................... P:3
   - Flights and Travel Insurance ............................................. P:3

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5. Interaction whilst Abroad ............................................................ P:9

Additional Related Resources ......................................................... P:11

Tools and Examples in this Section

- Pre-departure Guide
- Pre-departure Checklist
- Website: Travel information for students
  http://www.rmit.edu.au/globalpassport/traveladvice
- Pre-departure Guides
- The University of Melbourne Online Pre-departure
- Southern Cross University Guide
- Managing Expectations Reference Tool
- Student Handbook Template
- Application for Insurance
- Language and Cultural Training Reference Tool
- List of Possible Pre-departure Topics
1. Preparing Participants

Some of the many things that participants might need to prepare, regardless of the type of outbound opportunity, are:

- Visas
- Vaccinations
- Finances
- Language skills
- Flights
- Travel insurance and registration with SmartTraveller.gov.au
- Language and intercultural preparation options.

Students should also attempt to gain an understanding of their destination, including reading about the culture and any risks associated with the destination.

Visas

Visa issues for mobility projects overseas are not always straightforward. In all cases you should consult with the relevant High Commission, Embassy or Consulate for advice as to what visa is most appropriate for your students. A list of foreign diplomatic missions in Australia can be found at www.smarttraveller.gov.au

Frequently, students on longer-term projects, such as semester-long exchanges, are required to obtain a student visa (depending on their host country). Other programs are not always clear-cut.

Students participating on short term exchanges or study tours might enter their host country on a tourist visa rather than a study visa as study visas in some countries (for example, many European countries) are restricted to study stays over a particular duration (90 days, for example).

Service learning projects are often covered under tourist visas also.

Students going on internship or work placement projects tend to be the most complicated of all, as these projects often fall in the significant gap between ‘work’ and ‘study’ visas. The type of visa required might depend on if the student is being paid for their placement, the number of hours they are working and if the project is being run in conjunction with any other organisation, such as a university, in the host country.

Always seek advice from the relevant consulate or Embassy.

Vaccinations

Vaccinations other than those advised for Australia are not generally required for Western countries in North America and Europe. All other countries are likely to have some sort of vaccination recommendation and countries in Africa and South America may have vaccination requirements (Yellow Fever, for example). The World Health Organisation website provides some excellent information on vaccinations: http://www.who.int/ith/en/

Whilst you may provide general information to students about recommended vaccinations, students should be encouraged to seek their own medical advice about what they require.

Students requiring medication on an ongoing basis should bring a supply of it from Australia along with a note from their doctor outlining what the medication is for, should the student be questioned at customs/immigration.

Finances

Students need time to prepare their finances for their overseas project. In order to do this you should give them an indication of how much they could reasonably expect to spend as part of the project.
Take into account aspects like accommodation, transport, meals, cultural activities and discretionary spending money.

Several universities require students to complete a budget before going on exchange – this is often required as part of the application process for exchange. This ensures that students understand the financial commitment that going on exchange represents.

**Language and Intercultural Skills**

There is a wide range of experts who offer pre-departure and post-briefing services in both language and cultural training.

The reference tool attached includes details of just a few service providers who offer language and cultural services. Alternatively universities may have access to their own in house language and cultural awareness support. If this is the case then leverage this resource and source of knowledge to support staff and students in preparing for their international experience!

**Reference Tool:** *Language and Cultural Orientation Training*

**Flights and Travel Insurance**

Students might make their own travel arrangements or institutions might choose to include flights and/or insurance for students as part of any fee students pay for participating in an overseas project, like a study tour.

Remember, if students can’t afford travel insurance they can’t afford to travel!

If your university covers student travel under its own insurance policy you may need to have students complete an application form for that coverage.

Here is an example of an application form for travel insurance coverage from Swinburne University of Technology:

**Case Study:** *Application for Overseas Travel Insurance*
2. Pre-departure Sessions

Who are Pre-departures Given to?

The overwhelming majority of universities provide some form of pre-departure session to their students going on outbound exchange.

Provision of pre-departure sessions to students on non-exchange programs (like short programs or study tours) is far less common. Several institutions have acknowledged that they are potentially exposing themselves to risks by not providing this support to students.

<table>
<thead>
<tr>
<th>Pre-departure Session?</th>
<th>Yes – in person</th>
<th>Yes – online</th>
<th>Sometimes</th>
<th>No</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student exchange</td>
<td>91.3% (21)</td>
<td>4.3% (1)</td>
<td>0.0% (0)</td>
<td>4.3% (1)</td>
<td>23</td>
</tr>
<tr>
<td>Study tours</td>
<td>31.6% (6)</td>
<td>0.0% (0)</td>
<td>15.8% (3)</td>
<td>52.6% (6)</td>
<td>19</td>
</tr>
<tr>
<td>Other short programs</td>
<td>15.8% (3)</td>
<td>5.3% (1)</td>
<td>31.6% (6)</td>
<td>47.4% (9)</td>
<td>19</td>
</tr>
<tr>
<td>Placements (Internships / Clinical)</td>
<td>11.1% (2)</td>
<td>5.6% (1)</td>
<td>5.6% (1)</td>
<td>77.8% (14)</td>
<td>18</td>
</tr>
</tbody>
</table>

Structure of Pre-Departure Sessions

See this list of topics that might be covered as part of a pre-departure session and in a pre-departure guide:

**Checklist: List of Possible Pre-departure Topics**

Some examples of practice are:

- Pre-departure is compulsory at most institutions.
- Many institutions hold their pre-departure sessions in the evening, or even on weekends, to ensure a greater rate of attendance.
- One institution asks students to write a hypothetical letter to their parents ‘after something terrible has happened overseas due to them making a bad decision’.
- Returned students are quite often invited to attend and present at pre-departure sessions, often in the form of a student panel (where questioning can be guided by a facilitator).
- Universities frequently run multiple sessions based on the destination region that students are travelling to. This allows for customisation of content and special guests.
- Many universities require students who miss their session to either attend another session, or come to a face to face presentation with an advisor.
- At University of Western Sydney, the Vice Chancellor attends the pre-departure session and presents outbound students with a certificate.
- Murdoch University provides students with a guide and bag of stuff including – bag tags, a Murdoch t-shirt, a ‘health’ pack from a nurse, and a Murdoch prospectus – they actively mention that they want outbound students to bring other students back to Australia from overseas.
• Some institutions have students write a ‘Journey Letter’ to themselves about their expectations and fears. These are kept on file and given to students when they return home.

• At Swinburne University of Technology parents are invited along. In the past it has been compulsory that everyone brings someone along with them. Their session includes role-playing incidents with both students and parents.

• A number of universities hold multiple sessions on different topics throughout the student preparation period. The University of Canberra does three sessions: the first is mandatory – students are told where they have been accepted to go. At the second session they cover OS-Help, visas and insurance. At the third and final session they cover culture shock and other issues. Students who are unable to attend get sent PDFs of the relevant information. The sessions are about a month apart and all the guides are on the web.

• University of Technology Sydney does one large session but also includes a break-out session into country groups.

• At University of the Sunshine Coast, most outgoing students get to know a returned student before they get to pre-departure because the international office put them in touch directly. This is a very powerful retention mechanism.

• Victoria University runs a series of 3 sessions that are all compulsory. 2 of these are delivered by Culture Works (an external provider) and the final session is on administration. They have a 100% attendance rate.

• Several universities, including Curtin University of Technology and Flinders University, require students to complete their enrolment form at the pre-departure session. These are kept on file until the student is correctly enrolled overseas then actioned. Flinders University gives students an opportunity to meet with their faculty officers at the session.

• Several universities finish their sessions with drink, nibbles or some other form of social event (sometimes also involving current inbound students).

• The University of Queensland invites a doctor along to talk about health issues, including safe sex.

• There is a growing trend for institutions to also provide some sort of ‘training’ to outbound students on how to recruit inbound students – either for exchange or fee-paying programs.

• Monash University writes to parents asking them what they want to know (feedback is returned anonymously), allowing Monash University Abroad to answer the questions and meet the expectations of parents as well as students.

Special Guests
Some of the special guests that institutions invite to their sessions are:

• Careers Offices
• Student services sections to talk about culture shock, counselling issues, support services available, depression and other health issues
• Relevant consular or education groups, like Education USA or the Canadian High Commission
• Risk management or travel insurance people (including organisations like SOS International)
• External intercultural skills or language providers.

Online Pre-departures
The University of Melbourne has developed the standout online pre-departure module. This can be viewed at: http://www.safetyabroad.unimelb.edu.au/
This excellent production of slick videos and quizzes is both easy and interesting to watch, as well as being highly informative.

The University of Newcastle has an online pre-departure module that sits on its Learning Management System (see also Using Technology). Students have to go through a powerpoint presentation then complete a quiz on SurveyMonkey. Students are now also required to complete a pre-departure interview with the outbound coordinator.

Griffith University is setting up an online pre-departure module.

**Multi-campus Issues**

Multi-campus institutions frequently present pre-departure sessions on more than one campus, or (in the case where distances aren’t prohibitive) require students to travel to a main campus for the session.

Southern Cross University runs a formal pre-departure in a video conference room in order to stream it live across to other campuses – this has the positive effect of making students on outer campuses not feel like they are going through the process alone. The session is also recorded and can be used again later.

### 3. Pre-departure Guides and Student Handbooks

The overwhelming majority of universities provide students with a pre-departure guide or handbook before they participate in a student exchange. This is seen as a critical risk mitigation and duty-of-care step by many universities.

Guides are provided either electronically or in printed form, or both.

A small number of institutions also provide pre-departure guides for non-exchange programs such as study tours and practical placements. See the table below.

<table>
<thead>
<tr>
<th>Pre-departure Guide</th>
<th>Printed</th>
<th>Electronic</th>
<th>None</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student exchange</td>
<td>66.7% (14)</td>
<td>28.6% (6)</td>
<td>4.8% (1)</td>
<td>21</td>
</tr>
<tr>
<td>Study tours</td>
<td>13.3% (2)</td>
<td>20.0% (3)</td>
<td>66.7% (10)</td>
<td>15</td>
</tr>
<tr>
<td>Other short programs</td>
<td>13.3% (2)</td>
<td>40.0% (6)</td>
<td>46.7% (7)</td>
<td>15</td>
</tr>
<tr>
<td>Placements (Internships / Clinical)</td>
<td>7.1% (1)</td>
<td>21.4% (3)</td>
<td>71.4% (10)</td>
<td>14</td>
</tr>
</tbody>
</table>

**Examples of Practice in Australian Universities**

- Several universities, such as University of Technology Sydney, Southern Cross University and The University of Adelaide, have their pre-departure guide on their websites – available to download at anytime. Many such universities also provide students a printed copy at a pre-departure session.

- Some institutions provide copies of their pre-departure session presentation in lieu of a formal guide.

- Several universities provide pre-departure guides for non-exchange opportunities. Here you can see an example of Griffith University’s short term programs pre-departure Guide:
• Swinburne University of Technology tailors its pre-departure guide for particular study tours:

**Case Study:** Swinburne University of Technology
*Exchange Pre-departure Guide*

- Some universities, such as University of South Australia, do not provide students with a pre-departure guide, per se, but rather provide them with a Student Handbook early in the exchange process that covers administrative processes as well as pre-departure information. Here you can find a template Student Handbook for such purposes:

**Template:** *Student Handbook*

- Here are some examples of other pre-departure Guides:

**Template:** Murdoch University Pre-departure Handbook

**Template:** Griffith University Exchange Pre-departure Guide Template
4. Other Pre-departure Activities and Considerations

Pre-departure Checklists

An invaluable way of ensuring students have completed all of the steps they should complete prior to departure is by giving them a pre-departure checklist.

Pre-departure checklists should include all the administrative and travel preparations that students need to complete.

Some items to include on your checklist (this is only the start of a list):  
- Visas – what is required and when  
- Travel – are flight bookings required?  
- Travel insurance – do students need to buy their own?  
- Immunisations – are any required?  
- What paperwork needs to be submitted to your university and by when?  
- What paperwork needs to be submitted to the overseas university or host organisation?  
- Funding – does anything need to be done for travel grants / scholarships?

See this example of a Pre-departure Checklist from The University of Western Australia:

![Checklist: The University of Western Australia Pre-departure Checklist](image)

Managing Student Expectations

Managing participants’ expectations is crucial to ensure the best outcomes for the project. Managing expectation takes place primarily during the lead-up to students’ participation.

Managing expectations means ensuring that participants understand:

- What they will be doing whilst abroad  
- The logistics for their overseas experience (transport arrangements, accommodation, visits etc) and who is organising those (or if they need to organise it themselves)  
- The formalities they need to complete prior to their departure (visas etc)  
- The assessment requirements for their experience – what needs to be completed during the project and what may need to be completed afterwards (if appropriate).

Managing expectations means making students aware of the fact that sometimes things can change or go wrong – this is a normal part of an overseas experience!

How projects are promoted contributes heavily to the expectations participants are likely to have about it. If an overseas experience is promoted like a holiday, participants will have a holiday attitude towards it. If an experience is promoted as a work-intensive opportunity to enhance their skills, then students seeking that sort of experience are far more likely to apply.

Case Study – Managing Expectations

A group of university students were going a 3-week short term health project in Bangkok, Thailand.

During a pre-project site-visit, the staff member doing the visit identified the fact that the accommodation was very basic. Beds were quite hard and the showers only had cold water (which is not uncommon in
basic accommodation in Thailand). It had been arranged that students would be staying in twin-share rooms. The positives were that the accommodation was inexpensive, air conditioned and serviced weekly.

Armed with this information, the staff member returned to Australia and was able to include detailed information about what students could expect from their accommodation. The information, positive and negative, was included in both pre-departure materials and was directly addressed during a pre-departure session.

Students, therefore, knew exactly what to expect from their accommodation. This assisted them to make decisions on what to pack, to decide in advance who they wanted to share their room with and to be prepared for the fact that they wouldn’t have hot water.

In the final program evaluations students made comments about the accommodation such as ‘It was a bit hard to get used to not having hot water, and the beds were hard, but it wasn’t worse than I was expecting’.

We can imagine what the evaluations would have been like if accurate information hadn’t been given to students to begin with – they would have been pretty unhappy to arrive and discover that they didn’t have hot water!

The Needs of Different Student Groups

Different types of students have different expectations of their overseas experience. These expectations are influenced by many things, such as their maturity, previous travel experience and, of course, the quality of the information provided to students.

Some students can be quite needy in terms of the amount of contact they want to have with the project's administrator, which can be an issue for an administrator who is very busy. It is important to ensure that all students receive the same information.

For these reasons, it is wise to plan regular correspondence with program participants. This might take the shape of a weekly email update, scheduled information sessions, pre-departure preparation (either online, in sessions or through the provision of things to read) etc. Dealing with all students in bulk generates a certain ‘economy of scale’ for program administrators.

This tool is there to help you identify the different needs various types of students might have and the sorts of interventions you might need to make to help manage their expectations.

Reference Tool: Managing Expectations

5. Interaction whilst Abroad

Most universities maintain contact with their students whilst they are abroad. This is almost exclusively through email, although a few universities also use Facebook or ask a few students to maintain blogs whilst they are away.

Typically universities stay in touch to:

- Monitor any critical incidents that arise
- Make sure students have arrived okay
- Ask students to provide their contact details
- Ensure students have provided enrolment information and/or enrolled correctly
- Ask for photos or other testimonial material
• Remind them about re-enrolment information back home
• Remind them about graduation requirements
• Ask them to undertake an evaluation
• Inform them about reverse culture shock.

Several universities have ‘communication plans’ – a timeline of when and why they are going to contact students whilst they are away.

**Do you stay in contact with students whilst they are overseas?**

- Yes: 96%
- No: 4%

**On what issues do you provide support whilst students are overseas?**

- Enrolment
- Credit transfer advice
- Re-entry advice
- General progress monitoring
- Confirmation of arrival
Additional Related Resources:

**Case Study:** Edith Cowan University Exchange Student Advice Slide

**Template:** RMIT University Pre-departure Guide

**Template:** The University of Melbourne Pre-departure Guide

**Case Study:** University of Wollongong Travel ‘Emergency Card’ Outline

**Checklist:** The University of Western Australia Returning Early from Overseas

**Checklist:** The University of Western Australia Extending Exchange

**Template:** The University of Newcastle Pre-departure Session

**Template:** The University of Newcastle Pre-departure Quiz
Section Q:
Re-Entry
What’s in this Section?

1. Evaluations and Testimonials ................................................................. Q:2
   - 1.1 Student Evaluations ................................................................. Q:2
       ◦ Undertaking Evaluations ......................................................... Q:2
       ◦ Generating Testimonials .......................................................... Q:3
   - 1.2 Using Testimonials ....................................................................... Q:5
       ◦ Incentivising Returned Students .............................................. Q:5
       ◦ Extra-curricular Programs ......................................................... Q:5
   - 1.3 Undertaking Project-Level Evaluations ........................................ Q:6
       ◦ Why Evaluate Projects? ............................................................. Q:6
       ◦ When and How to Evaluate Projects? ....................................... Q:6
       ◦ What do you do with Evaluation Information? ......................... Q:6

2. Re-Entry Sessions .................................................................................. Q:7
   - Celebrating and Recognising the Experience .................................. Q:7
   - Articulating Outcomes .................................................................... Q:8

3. Exchange Clubs .................................................................................... Q:9
   - Benefits of Exchange Clubs .......................................................... Q:9
   - Challenges ..................................................................................... Q:9

4. Re-Entry Guides .................................................................................... Q:10

5. Buddy and Ambassador Programs ....................................................... Q:11
   - Buddy Programs ........................................................................... Q:11
   - Ambassador Programs .................................................................. Q:11

Additional Related Resources ................................................................. Q:12

Tools and Examples in this Section

- Returned Students Guide
- Re-Entry Session Powerpoint and Handout
- Re-Entry Questions
- RMIT University Photo Competition
- Exchange Evaluation Form
- Letter of Achievement Template
- Certificate of Achievement Template
- Photo and Video Consent Form Template
- Audience Attention Span Reference Tool
1. Evaluations and Testimonials

1.1 Student Evaluations

Undertaking Evaluations

The overwhelming majority of universities undertake some form of evaluation of their students’ experiences. However, whilst there are some examples of excellent practice, as a broad generalisation universities are not systematic in the collection and use of evaluations. A great number of institutions still undertake paper-based evaluations, response rates are typically relatively low and often evaluations are simply filed and not used for any major purpose.

Undertaking evaluations is a critical and fundamental step in validating the quality of various partners and programs, as well as mitigating against potential risks for future students. Improving evaluation processes and uses is likely to be an important part of universities’ future risk management and quality assurance steps for outbound mobility.

The first step in ensuring evaluations are easy to collect and use is to collect them electronically. A number of universities collect evaluations using SurveyMonkey or similar internally-designed survey tools.

Several universities, including The University of New South Wales and University of South Australia, do not transfer students’ grades until they have returned their program evaluation. This is an excellent strategy for ensuring a 100% (or close to) return rate.

With the impending implementation of the Australian Higher Education Graduation Statement (AHEGS), universities have an opportunity to enforce mandatory completion of evaluations: no evaluation = no entry on the AHEGS!

Murdoch University’s strategy is to request that students complete their evaluations for exchange about a month before they come home – this ensures a higher return rate, a lack of distractions from being back home, and accurate real-time feedback on their experience.
The University of the Sunshine Coast requires all returned students to come in for a five minute interview to provide feedback on their experience before they are able to collect their transcript.

Some example evaluations:

**Template:** *The University of Western Australia Exchange Evaluation Form*

**Case Study:** *Swinburne University of Technology
Returning Evaluation and Essay*

**Template:** *Murdoch University Re-Entry Questions*

**Generating ‘Testimonials’**

Some material obtained through evaluating students is useful as a testimonial for future students. Useful testimonial material may include:

- Comments from evaluations
- Photos
- Links to students’ blogs or websites
- Audio and video testimonials.

It is always best to collect testimonials as soon after the completion of a program as possible, ideally as part of the student evaluation process.

**Evaluation Comments:** Text evaluations can be used in future promotions on websites, marketing materials and in emails.

**Photos:** Email students after the conclusion of the program to ask them for photos. It is necessary to also ask students to give you permission to use those photos.

**Template:** *Photo and Video Consent Form*

**Case Study:** *Swinburne University of Technology
Consent and Release Form*
If you have set up a Facebook page, you may be able to access photos that students have posted on their personal profiles. Note that these are only low resolution (if you wish to use them for marketing materials you will need to request high resolution photos from the student) and you will need to obtain permission to use them.

**Photo Competitions:** Several universities have had significant success with running photo competitions. A great example is RMIT University, who used the university’s galleries to display the photo competition entries and winners.

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**Case Study:** RMIT University Photo Competition

**Links to Student Blogs:** Providing links to student blogs is a fantastic way of promoting overseas mobility programs to other students – they are honest, visual and readily accessible on the web.

Several universities link students’ blogs to their websites.

**Audio and Video Testimonials:** Audio and video testimonials are a powerful way of communicating with potential future students. They can be added to websites, loaded onto YouTube or Facebook and provide dynamic, exciting feedback about the program.

Audio and video testimonials should not exceed 1–2 minutes in length, as internet audience attention span decreases rapidly after an audio/video clip reaches 60 seconds in length.

Read more in this article about Audience Attention Span:

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**Reference Tool:** Audience Attention Span

A cheap handicam or laptop with a webcam can be used to record videos. These need to be formatted in a particular way.

Learn more about YouTube videos here: [http://www.google.com/support/youtube/](http://www.google.com/support/youtube/)

Audio testimonials can be recorded using a microphone plugged into a laptop or desktop. You can use either free or licensed software for making recordings.


Types of questions you might like to ask in an audio / video recording are:

- Tell us about the activity you undertook overseas?
- What was the highlight of your overseas trip?
- What was the most interesting thing that you learned whilst you were away?
- What was the best cultural experience you had overseas?
- What would you say to other people who were thinking of undertaking this activity?
1.2 Using Testimonials

Testimonials are the best way of encouraging participation of future students on overseas activities. Use testimonials:

- As quotes and photos in your printed materials for future programs / projects
- In newsletters or on posters
- In presentations to generate buy-in, or applications, for future programs
- On your Institution’s webpage as a News article
- On Institution blogs and Facebook pages (if you have them)
- On your Institution’s webpage in the space used to promote the program.

The greater the variety of testimonials, the more dynamic and exciting the opportunity seems to future participants.

See also Promoting Programs for examples of how and where testimonials have been used.

Your Best Asset – Returned Students

See also 5. Buddy and Ambassador Programs.

Returned students are often enthusiastic to share their experiences with potential future students.

Returned students can be used to promote future opportunities by:

- Attending and talking about their experience at Information Sessions
- Participating in marketing activities, like putting up posters or helping out at an event designed to promote the overseas opportunity (e.g. a promotional BBQ)
- Participating in online webinars with prospective students
- Providing testimonials.

Incentivising Returned Students

You can capitalise on returned students’ enthusiasm by offering them incentives to remain involved. Small, cost-free incentives can prove remarkably motivating for students:

- Offer students an additional reference in exchange for their participation promoting their experience
- Appoint a returned student as an ‘Ambassador’ of the particular project or program from which they have returned
- Offer for the student’s experience to be the feature of an institutional ‘News’ article
- Invite a returned student to be a special guest speaker at an ‘orientation session’ for new students
- If space permits, invite a student to be a volunteer to help promote outbound mobility options around the university – give them desk space and invite them to contribute ideas as to how best to communicate with other students
- Paid casual work in return for students undertaking additional volunteering work to promote outbound mobility opportunities.

Extra-curricular Programs

Several universities have special programs that ensure returned students remain involved in ‘international’ activities once they are back on campus. These initiatives often take the form of International Leadership or Global Citizenship programs.
These programs are addressed in greater detail in Section L: Types of Outbound Opportunities / International Leadership Programs however, some examples are:

- The University of Newcastle’s iLEAD program
- Deakin University’s Global Citizenship program
- Macquarie University’s Global Leadership Program
- Global Experience at University of South Australia
- BUiLD at University of Technology Sydney.

1.3 Undertaking Project-level Evaluations

Outbound mobility projects are considered to be new or recurring outbound initiatives that have a limited duration and where special arrangements are required to run the initiative. For example: study tours, group projects like moots or conference attendance, volunteering projects etc.

Why Evaluate Projects?

Evaluating individual projects is a critical part of the ‘continuous improvement’ process for your student mobility program. It helps to identify strengths and weaknesses and can generate useful information, such as testimonials. When reporting on your mobility program, the outcomes of individual projects are invaluable.

When and How to Evaluate Projects?

Depending on who is evaluating the project, the timing may vary slightly as to when the evaluation is ideally conducted.

<table>
<thead>
<tr>
<th>Who</th>
<th>When</th>
<th>Why</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td>Immediately prior to the conclusion of the project</td>
<td>Students can be very difficult to get hold of once they return to their ‘normal lives’ – they go back to work and study. It is best to get their evaluations before this happens and whilst the experience is still fresh.</td>
</tr>
<tr>
<td>Academic / Project Leader</td>
<td>Shortly after the conclusion of the project</td>
<td>Project leaders should typically be given a few days or a week to ‘digest’ the project before evaluating it. However, staff often have significant backlogs of work to catch up on, so it should not be left too long or it may not be a priority.</td>
</tr>
<tr>
<td>Partner Organisation</td>
<td>A few weeks after the conclusion of the project</td>
<td>Partner organisations have ongoing administration to complete after a project is finished and often need a little bit of time to ‘breathe’ and reflect.</td>
</tr>
</tbody>
</table>

Staggering when evaluations are conducted also allows you to better monitor evaluations as they are returned, or to follow up with individuals if they are not being returned.

What do you do with Evaluation Information?

- Use the comments as testimonials. If you have asked students to ‘rate’ the program, use these statistics to show students had a great time, learned a lot etc.
- Use it for reporting – evaluation information provides solid, quantifiable data that can be used in official institutional reports or to justify the expansion of your mobility program.
- Most importantly, use it for future planning. The experiences you have had with one project are invaluable in improving future editions of that project or in developing new ones.
2. Re-Entry Sessions

There is a trend in Australia’s more developed university outbound mobility programs to establish a formal re-entry session for students coming back from abroad.

Do you run a re-entry program for students returning to their Australian degree / institution?

![Bar Chart]

As one practitioner stated:

‘I have the sense that it’s difficult for students to work out what they’ve gained from exchange and to articulate that. Expecting students to be able to articulate the outcomes of their experience without giving them tools on how to do so is a little unrealistic’

Re-entry sessions are partly about recognising the students’ experiences and partly about helping them to articulate the outcomes of their experience.

A project by several universities (Murdoch University, Macquarie University and University of Wollongong) called ‘Bringing the Learning Home’ (funded by the now-defunct Australian Learning and Teaching Council) is looking at re-entry issues for students, amongst other things. This project is due to report in 2012. For more information see: http://www.tlc.murdoch.edu.au/project/btlh/projectinfo.html

Celebrating and Recognising the Experience

Several universities provide returned students with a certificate upon completion of certain outbound programs.

Here is an example of a basic certificate for students that acknowledges their involvement in a program. This may also be supported through a more detailed letter outlining the specifics of the program and the key competencies that were achieved through the experience.
Celebrating and recognising students’ experience sometimes also includes hosting an event for returned students. Macquarie University, for example, holds a social welcome back event funded by the international office – this type of event is perfect for students to get a positive feeling about their experience but also feel like they are part of a ‘group’ – this becomes more important when trying to generate buy-in from students to participate in a Student Exchange Club (see below) or on Facebook.

**Articulating Outcomes**

Many universities hold, or are moving towards holding, formal re-entry session aimed at helping students to articulate the outcomes of their experience.

These sessions have a number of benefits, such as:

- Helping students to be able to ‘sell’ their experience to employers
- Promoting a feeling of being part of a group
- Allowing students to contextualise certain feelings, like reverse culture shock
- Generating buy-in for further participation, such as promoting outbound.

One of the challenges is that it can be hard to get students to participate: 15 universities indicated that, on average only 30% of students attended the re-entry session provided. This percentage, however, ranged from 0–98% depending on the institution. At least one institution does not allow students’ grades to be transferred until they’ve attended a session.

Several universities, including RMIT University, Charles Sturt University and University of South Australia, involve the Careers section of their universities to help ‘teach’ students about the skills they have obtained whilst abroad. University of South Australia have shared a description of their session, as well as the Powerpoint of their workshop.

Some universities, such as The University of Queensland, involve the Student Services section of their university to talk about issues like reverse culture shock.
Other invitees to sessions might include:

- A representative of the Student Exchange Club
- Someone to talk about the Buddy Program.

When it comes to structuring re-entry sessions, there are many models. Swinburne University of Technology, for example, has a formal one hour returning home session followed by a welcome party straight after for the new inbound students as part of their ‘Swinmates’ program (see Exchange Clubs). Others have structured sessions involving international office, careers offices and other returned students.

Several universities require students to RSVP for re-entry sessions. A platform like Eventbrite [www.eventbrite.com](http://www.eventbrite.com) can help manage such an event: see Using Technology.

### 3. Exchange Clubs

![Bar chart showing Yes and No responses to the question: Do you have a student exchange club?

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Student exchange clubs can be very effective when done well. Some universities have used interns, or even paid casuals, to help get their exchange clubs off the ground.

Swinburne University of Technology requires one of their scholarship recipients to commit to being President of their Swinmates club.

**Benefits of Exchange Clubs**

- Great integration measure for inbound students
- Powerful promotional tool for recruiting more outbound students

**Challenges**

- Often rely on a few key people
- Can become inactive depending on students’ commitments
- Duty of care issues and potential reputational issues if they get up to mischief
Support sometimes provided by International Offices to clubs includes:

- Help getting clubs established
- Help completing ongoing affiliation paperwork and requirements
- Funding for some events: some clubs receive minimum or no funding from international offices, however, the best clubs often receive generous funding (up to several thousand dollars per year). Funding may also be available through student unions.
- In-kind support for administration, such as banking or ticketing
- Promotional support – advertising to incoming students and returning outbound students
- Support advertising and running events
- Temporary office space to allow club officials to work on club activities.

A few excellent examples of Exchange Clubs are:

- Monash University’s MEX club

### 4. Re-Entry Guide

The University of Melbourne has produced a standout Returning Student Guide and companion website. See [The University of Melbourne’s Returning Student Guide](http://www.mobility.unimelb.edu.au/outbound/returning-home/index.html):

**Template:** *The University of Melbourne Returned Students Guide*
5. Buddy and Ambassador Programs

Many universities have established ‘Buddy’ or ‘Ambassador’ programs that incorporate returned students.

**Buddy Programs**

Buddy programs are programs designed to integrate inbound students with returned outbound students or internationally-focused domestic students.

Buddy programs frequently overlap with Student Exchange Clubs and ‘Ambassador’ programs (see below). One example of a buddy program is the Meet a Mate at Mac program at Macquarie University [http://www.international.mq.edu.au/goingabroad/alumni](http://www.international.mq.edu.au/goingabroad/alumni)

Buddy programs generally involve limited support from international offices such as:

- Facilitating ‘introductions’ between inbound and outbound students
- Organising social catch ups between inbound and returned outbound students
- Organising events for inbound students (like tours or visits) that may or may not involve returned outbound students.

International Office engagement with Buddy Programs tends to be most active during the early parts of semester, with students being left to their own initiative as the semester progresses.

**Ambassador Programs**

Ambassador Programs have the goal of using returned students to promote outbound opportunities to other students. There is a definite trend in universities towards establishing Ambassador programs for returned students.

Whilst there are several examples of excellent Ambassador programs around Australian universities, the best example is Deakin University’s Peer Advisor program. For more information on this program see Staffing / Using Students and Interns / Deakin University’s Peer Advisor Program.

Ambassador programs generally ask students to:

- Help promote outbound opportunities to other students
- Talk with interested students about their experiences
- Attend promotional events like information sessions and exchange fairs
- Contribute testimonials, photos and videos for use by the international office
- Act as a ‘buddy’ for an inbound student (see above).

In return, students are frequently provided with either a certificate or reference, or a small acknowledgement of some form such as a gift or discount voucher.

Some key things identified by institutions as being necessary for a successful Ambassador program are:

- Thorough screening of potential ambassadors (not all students are effective ambassadors)
- Provision of excellent training to ambassadors
- Commitment by students of a minimum of one semester, preferably longer
- Supervision throughout semester
- Provision of good incentive to participate, such as a reference or certificate
- Clear guidance as to the activities to be undertaken, along with appropriate timelines and feedback mechanisms to ensure the work has been completed.

See Section E: Staffing / Using Students and Interns.
### Additional Related Resources:

<table>
<thead>
<tr>
<th><strong>Template:</strong> Edith Cowan University ‘To be a Buddy’ Program Application Form</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Policy:</strong> Edith Cowan University Buddy Program ‘Statement of Understanding’</td>
</tr>
<tr>
<td><strong>Case Study:</strong> Edith Cowan University Buddy Program Training Session Outline</td>
</tr>
<tr>
<td><strong>Reference Tool:</strong> Buddy Scenarios from Edith Cowan University’s Training</td>
</tr>
<tr>
<td><strong>Template:</strong> Murdoch University Buddy Program Application Form for Inbound Students</td>
</tr>
<tr>
<td><strong>Template:</strong> Murdoch University Buddy Program Application Form for Outbound Students</td>
</tr>
<tr>
<td><strong>Policy:</strong> Murdoch University Buddy Program ‘Statement of Understanding’</td>
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</table>
Section R: Credit and Acknowledging Experiences
What’s in this Section?

1. Credit or Other Recognition? ......................................................... R:2
   - Full Credit .................................................................................. R:2
   - Approved as a Component of a Subject ........................................ R:2
   - Recognised but not for Credit .................................................... R:2
   - No Credit or Recognition .......................................................... R:2

2. Models for Credit Transfer ............................................................ R:3
   - Placeholder Subjects ................................................................. R:3
   - Approvals .................................................................................. R:3
   - Enrolment .................................................................................. R:4
   - Transfer ..................................................................................... R:4
     o Examples of Models of Credit Transfer .................................... R:4

3. Learning Agreements and Enrolment Forms ................................ R:7

4. Credit Matching ............................................................................ R:7
   - Practice at Australian Universities .............................................. R:7

Additional Related Resources ........................................................ R:9

Tools and Examples in this Section

- Many universities actually require students to have subjects approved as part of the application process for exchange.
- A number of universities no longer require students to produce outlines from the overseas institution where the course will only count back as an elective.
- A number of universities require students to complete their enrolment form for overseas at the pre-departure session.
- Several universities refuse to transfer credit until students have returned an evaluation or report on their exchange experience.
- One university fines students $100 if they are not enrolled by Census if it’s the student’s fault.
- One of Curtin University of Technology’s US partners changed part of their health curriculum to match Curtin’s so mobility now works very well with them.
- La Trobe University has amended part of its curriculum in one discipline to match the US curriculum style – one of the benefits of this has been to enable mobility.
- A number of universities are recognising international learning experiences through extra-curricular International Leadership or Global Citizenship programs
- University of South Australia has a table on their website that gives students a broad indication of how many courses they should be doing at a particular university overseas to be full-time.
- Macquarie University has established special study periods in its administration exclusively for exchange units – e.g. regular subjects appears in the ‘Semester 1 Study Period’ whilst exchange units at the same time appear in the ‘Northern Hemisphere Semester 2 Study Period’.
- Examples of learning agreements, credit approval and enrolment forms also appear in this section.
### 1. Credit or Other Recognition?

An international study experience can be for credit, for some other form of recognition or not for credit/recognition.

<table>
<thead>
<tr>
<th>No credit</th>
<th>Recognised but not for credit</th>
<th>Approved as a component of a subject</th>
<th>Full credit</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Less complex</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Full credit</strong></td>
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</tbody>
</table>

#### Full Credit

Full credit opportunities are things like semester exchanges, approved short courses and study tours, or international opportunities where the overseas experience counts back to the home university as an entire subject (or subjects). This might also include opportunities like international practicums or internships where the home university has created a subject such as ‘International Clinical Placement’ or ‘International Internship’.

#### Approved as a Component of a Subject

There are many international study experiences where the experience forms part of the unit but where there are other requirements that need to be completed in Australia.

An example is a class where students undertake lectures in Australia on a particular natural environment, then spend two weeks overseas in the field undertaking research and return to Australia to complete assessment and contextualise their experience.

Clinical placements, internships and subjects with field work often fall in this category.

#### Recognised but not for Credit

Institutions can ‘recognise’ international study experiences in many ways.

- A number of universities are now doing this through International Leadership or Global Citizenship programs. These tend to be extracurricular programs where students have to complete certain requirements (or gain a certain number of ‘points’) in order to satisfy the requirements of the program.

- More information about these programs can be found in Section L: Types of Outbound Opportunities.

- A majority of universities are already making provisions for international study experiences to be recorded on their Australian Higher Education Graduation Statement (AHEGS).

- Many degrees now have ‘Hurdle Requirements’ – non-credit requirements that students must complete in order to either progress with, or complete, the degree. There are a number of examples of hurdle requirements that can be taken internationally – for example, internship experiences.

- Experiences can also be acknowledged by the faculty in some way as experientially beneficial – for example, a student undertaking an in-country language course might not have it credited towards their degree, but might get some sort of ‘endorsement’ from their faculty that they have completed the experience and that it is valuable for the student’s language ability.

#### No Credit or Recognition

An independent overseas study experience that is not recognised in any way by the student’s Australian university.
2. Models for Credit Transfer

Universities were asked to rank the difficulty of credit transfer at their institution. The following table outlines their responses.

<table>
<thead>
<tr>
<th>Credit Transfer</th>
<th>Extremely Difficult</th>
<th>Quite Difficult</th>
<th>Neutral</th>
<th>Quite Easy</th>
<th>Very Easy</th>
<th>Rating Average</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>8.7% (2)</td>
<td>21.7% (5)</td>
<td>39.1% (9)</td>
<td>30.4% (7)</td>
<td>0.0% (0)</td>
<td>2.91</td>
<td>23</td>
</tr>
</tbody>
</table>

An interesting result from a 2008 DIISRTE survey was that at universities where academics’ travel was supported in some way (either financially or with logistics supported) academics were more supportive of credit transfer (see Section K Working with Faculty) (Attitudes and Practice in Outbound Mobility at Australian Universities, DIISRTE, 2008).

Placeholder Subjects

Almost all universities have ‘placeholder’ subjects to generate HECS fees for students whilst they are on exchange (and sometimes also for non-exchange opportunities like short courses, study tours or placements). These are typically called Exchange Units.

Some universities have only a very small number of ‘Exchange Units’ whilst others have literally hundreds.

The difference in this approach relates to compliance and funding models.

Where a university only has a small number of Exchange units, often all students are enrolled in the same codes regardless of what disciplines they are studying overseas and what subjects they normally study in Australia. In some cases even the number of credits that students take overseas at the host institution is not taken into consideration and students are just enrolled in a ‘block’ of full-load (0.5 EFTSL per semester), full-time credit. Students then pay HECS on all of that credit, regardless of whether they end up transferring a full-load (0.5 EFTSL per semester) of credit back to Australia.

In this case, the subjects taken overseas are often loaded as ‘exemptions’ on the students’ records.

Where universities have huge numbers of Exchange Units, those institutions have commonly taken the view that the enrolment in Australia needs to match the enrolment overseas.

Example

An Australian business student goes on exchange and takes four courses: three business courses and a history course. Their enrolment in Australia is in three exchange ‘business’ codes and one exchange ‘history’ code.

This is technically the most compliant with HEIMS requirements (fees can be charged at the correct HECS Band level and credit point value) and means that the fees received for the units study overseas can be distributed to the Australian faculties that have ‘given up’ the student enrolment for that semester i.e. 3 x Fees goes to the business faculty and 1 x Fees goes to the history faculty.

Having a minimal number of exchange units appears to be a cleaner, easier solution to crediting exchanges. However, whether this approach is possible is entirely dependent on an institution’s funding model and approach to compliance.

Approvals

Students are almost exclusively required to seek approvals for their overseas study subjects prior to departure from Australia.
Many universities actually require students to have subjects approved as part of the application process for exchange. This is good practice as it ensures students have verified whether or not they can get credit before further work is done to accept the student into the program, thus removing a barrier.

Often such universities require that students only have subjects approved for their first preference as part of the application process. However, a few universities require that students have subjects approved for all of their preference universities. This has the benefit of removing credit transfer as a barrier before further work is undertaken, but the drawback of placing additional workload on staff approving units.

Students are commonly asked to seek from 5–10 subject approvals for their preference university/ies.

One university cited an example of a student who had more than 100 subjects approved for an exchange!

If changes are required once overseas, students are generally required to liaise with the relevant faculty contacts in Australia to have the appropriate approvals generated.

A number of universities have managed to gain the relevant approvals so that students no longer need to produce outlines from the overseas institution where the course will only count back as an elective. A usual proviso is that the overseas course has to be an academic course (not, for example, a ‘general education’ unit as exists in the US).

The rationale is that the host institution has already been through an academic vetting process as part of signing the exchange agreement, thus removing the need to be as strict on pedagogical verification.

This is excellent practice that streamlines mobility for students, academics and professional staff alike.

Several universities have developed ‘Credit Equivalency / Load’ tables that outline how many courses at an overseas university are required for a student to be enrolled full time.

**Enrolment**

A number of universities require students to complete their enrolment form for overseas at the pre-departure session. Amendments are then made if required.

Several universities fine students if they do not enrol correctly whilst overseas.

A couple of universities have gotten around the problem of census dates by creating their own special ‘overseas exchange’ study periods, complete with different enrolment, census and reporting dates.

**Transfer**

Several universities refuse to transfer credit until students have returned an evaluation or report on their exchange experience. A few also require students to either submit photos or participate in promoting the program before credit can be transferred.

**Examples of Models of Credit Transfer**

Please note: The information below is intended only to be a snapshot of how some universities handle aspects of credit transfer, particularly for exchange.

**University of Technology Sydney**

Student completes the application form with 5 choices. They must list the direct equivalent subjects at University of Technology Sydney for all 5 choices, or if they are electives they can just list subjects. Outlines are only needed for direct equivalents.
The University of New South Wales

Students have subjects approved as part of their application.

At pre-departure students fill out the codes they want to be enrolled in: codes are divided by credit (either 2 x 12 credits or 24 credits, split by faculty). This generates tuition fees. Once overseas, students are asked to send notification of the subjects they’re enrolled in. If they don’t have relevant approvals they should seek email approvals then have the form signed once they get back.

Once back, students have to finalise their evaluation and course approvals in order to receive their transcripts. These are faxed to Student Central who add the credit equivalencies to the transcript. If a student fails a course overseas, they have paid HECS but it doesn’t appear on their transcript.

University of Canberra

The course credit transfer agreement is signed off before students go by their convenor. They email their convenor from overseas if courses change. Students are enrolled in one of 2 or 3 exchange codes. Upon return, their student agreement is amended if necessary and it gets sent to the ‘Student Progress’ section who update the student’s record.

Victoria University

Credit is signed off as part of the application process. When the host transcript arrives at the International Office it is sent with a copy of the study plan to the student advice officer (international) in the faculty who actions the credit transfer.

Griffith University

Students have their study plan approved as part of their application. After the transcripts arrive, students submit their exchange report with five photos / video. The transcripts and study plans are then sent over to student administration who transfer credit. Students are fined $100 if they are not enrolled by census if it’s their fault.

Swinburne University of Technology

Credit is approved as part of the application by the ‘Swinburne Abroad Network Member’ – this is the person in a faculty who signs approvals and transfers credit. Swinburne Abroad meets with these staff members four times annually and also involves them in broader meetings about the exchange program.

Monash University

Credit must be signed off by the Head of Department relevant to the overseas subject, as well as by the Faculty Exchange Administrator.

University of Western Sydney

University of Western Sydney International processes exchange enrolments. The Registrar processes grade transfers. Students are enrolled in one of about 14 exchange codes, which are based on HECS banding.

Charles Sturt University

Within a month of students starting overseas they get sent a confirmation of enrolment form. Students must complete it, the partner signs it and it gets sent back.

As part of application process, students have their Course Coordinator approve credit. Once students are away the form gets sent to the Student Administration Office who enrolls students in the exchange codes.

When the transcript comes back, Student Administration allocate the TCR grade (Transfer of Credit – ungraded pass). This process is mostly implemented between students and other administrators.
**Macquarie University**

Macquarie University hosts a session after acceptance to cover the process of getting credit. Students get an official form to complete and exemptions officers assess and approve (or reject) credit. Students must provide as much information to officers about the subjects as possible.

Enrolments are done in house and students are enrolled in exchange units. Macquarie University has hundreds of them. Exchange units appear in special study periods.

**The University of Queensland**

Students get approvals as part of their application. Thanks to some hard work, if the overseas course is an elective, students now only need the course title, code, year level (introductory/advanced) and credit value.

Once the transcript is received from the host post-exchange, it is sent with the student’s full file to the faculty who transfers credit. A scanned copy of the transcript – instead of a hard copy – is now deemed sufficient for credit transfer to happen. This has facilitated the process considerably.

**The Australian National University**

As part of the application process students meet with a College Advisor to get “in principle” approval to participate in the program. This involves a study plan that focuses on the types of classes they want to study overseas and what they need to do once they return from exchange to graduate. Once students are accepted into the program and nominated to a specific host university, they complete course approvals with the College. Credit Transfer is done by the College at the completion of the exchange.

**RMIT University**

Schools approve credit and manage enrolments.

**Queensland University of Technology**

The new student database, SEMS, is set up so students can load subjects online and academics can approve them online. People all around the university with access to the database can then view what students are enrolled in and the approvals that have been granted.

**University of South Australia**

There is a table on the website that gives students a broad indication of how many courses they should be doing at a particular university overseas.

After their exchange, students must submit a returned student report. There is a 100% return rate as grades are not transferred if it is not returned.

Once the academic transcript arrives (via student or directly from the host), the international office does the paperwork which is sent to Program Directors for sign off. This then goes to Student and Academic Services who do the Grade Entry as either a non-graded pass or fail.
3. Learning Agreements and Enrolment Forms

Learning agreement and enrolment forms vary greatly between institutions. Some examples of these documents are:

**Case Study:** Swinburne University of Technology Student Learning Agreement and Study Plan

**Template:** The University of Western Australia Final Enrolment Form

**Template:** University of Wollongong Advanced Standing Form

**Policy:** Murdoch University Credit Transfer Form

4. Credit Matching

A significant number of institutions indicated that they do not undertake credit matching because of the complexity and time involved in the task.

However, one university has credit matching written into certain agreements. This Curriculum Mapping template might be of use to universities wishing to undertake credit-mapping exercises.

**Template:** Curriculum Mapping

Practice at Australian Universities

*Edith Cowan University*

Edith Cowan University has completed a pilot program with psychology on matching credit. If this has an impact they intend to roll out the initiative to other faculties, particularly targeting disciplines where coordinators are supportive. They completed the activity by asking the relevant partners for
the course information and detailed unit outlines, then passed this to their faculty who matched it up to relevant Edith Cowan University units.

**Swinburne University of Technology**

If students are having trouble finding credit equivalents then Swinburne Abroad steps in to help find the credit equivalents.

**The University of Newcastle**

The University of Newcastle stores all the credit agreements electronically and keeps scanned copies of all the transcripts.

**Deakin University**

Deakin University aims to overcome the credit issue by identifying one overseas study opportunity (either an exchange, a short program, practical placement etc) per degree program.

**Curtin University of Technology**

One of Curtin University of Technology’s US partners changed part of their health curriculum to match Curtin’s so mobility now works very well. This was negotiated at School level.

One of Curtin University of Technology’s partner’s short term summer programs has been approved as Curtin’s business capstone unit.

**The Australian National University**

The International Office has a part time academic advisor who does quite a lot of credit matching.

**The University of Queensland**

Two faculties have credit precedence online for students to see.

**Queensland University of Technology**

All pre-approvals are done at faculty level. Their SEMS database has the capability to report on approvals previously granted.

**La Trobe University**

In the nanotechnology area, La Trobe University’s faculty reconfigured their whole program to mirror the US style of curriculum in this area. Once again, this has been faculty driven and has opened up many more opportunities for students to undertake exchanges. This is a clever way of enabling mobility in very specific, restricted degree areas.
Additional Related Resources:

**Policy:** Deakin University US Equivalency Grading Scale

**Policy:** Edith Cowan University Credit Transfer Form

**Reference Tool:** University of South Australia Credit Equivalencies by Partner List

**Template:** University of South Australia Course Approval Form
Outbound Mobility Best Practice Guide for Australian Universities

Section S:
Degree Structures

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas
Degree Structures: Examples of Practice

Having degree structures that make outbound mobility compulsory or at least heavily encouraged has long been viewed as the perfect way to stimulate more outbound mobility.

However getting these sorts of degree structures in place is usually complex, requiring very long lead times and the support of academic faculties.

Changes to degree structures, such as adding a compulsory mobility experience or creating ‘free electives’, are highly specific to universities and this Guide does not attempt to outline what steps institutions should take.

However, below are some examples of degrees and programs that have integrated or highly encouraged international components. Universities wishing to pursue this path can cite these examples when discussing possible degree changes with faculties. This is a very brief, non-exhaustive list.

<table>
<thead>
<tr>
<th>University</th>
<th>Degree</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Technology Sydney</td>
<td>Bachelor of International Studies (Australia’s most frequently cited example of a degree with integrated mobility)</td>
<td><a href="http://www.iis.uts.edu.au/">http://www.iis.uts.edu.au/</a></td>
</tr>
<tr>
<td>Swinburne University of Technology</td>
<td>International Business</td>
<td><a href="http://courses.swinburne.edu.au/courses/Bachelor-of-Commerce-%28International-Business%29-BCIB140/local">http://courses.swinburne.edu.au/courses/Bachelor-of-Commerce-%28International-Business%29-BCIB140/local</a></td>
</tr>
<tr>
<td>Edith Cowan University</td>
<td>Nursing degree has lots of overseas placements in their final year</td>
<td><a href="http://www.ecu.edu.au/schools/nursing-and-midwifery/overview">http://www.ecu.edu.au/schools/nursing-and-midwifery/overview</a></td>
</tr>
<tr>
<td>The University of Queensland</td>
<td>Bachelor of International Studies</td>
<td><a href="http://www.uq.edu.au/study/program.html?acad_prog=2316">http://www.uq.edu.au/study/program.html?acad_prog=2316</a></td>
</tr>
<tr>
<td>The Australian National University</td>
<td>Bachelor of Latin American Studies</td>
<td><a href="http://studyat.anu.edu.au/programs/3120XBLAS;overview.html">http://studyat.anu.edu.au/programs/3120XBLAS;overview.html</a></td>
</tr>
<tr>
<td>The Australian National University</td>
<td>Bachelor of International Business</td>
<td><a href="http://studyat.anu.edu.au/programs/3409XBINTB;overview.html">http://studyat.anu.edu.au/programs/3409XBINTB;overview.html</a></td>
</tr>
<tr>
<td>University</td>
<td>Degree</td>
<td>URL</td>
</tr>
<tr>
<td>--------------------------</td>
<td>---------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Macquarie University</td>
<td>Bachelor of International Studies</td>
<td><a href="http://www.arts.mq.edu.au/undergraduate_programs/degrees_by_name/bachelor_of_international_studies">http://www.arts.mq.edu.au/undergraduate_programs/degrees_by_name/bachelor_of_international_studies</a></td>
</tr>
<tr>
<td>The University of Melbourne</td>
<td>Chancellor’s Scholars Program</td>
<td><a href="http://www.futurestudents.unimelb.edu.au/admissions/entry-requirements/guaranteed-entry/chancellors-scholars-programs">http://www.futurestudents.unimelb.edu.au/admissions/entry-requirements/guaranteed-entry/chancellors-scholars-programs</a></td>
</tr>
<tr>
<td>University of Canberra</td>
<td>Bachelor of International Studies</td>
<td><a href="http://www.canberra.edu.au/courses-units/ug/arts/793aa">http://www.canberra.edu.au/courses-units/ug/arts/793aa</a></td>
</tr>
</tbody>
</table>

**Some Generalisations**

In a survey, 20 of the 24 responding universities indicated that they have degrees where mobility is either compulsory or strongly encouraged. One institution strongly encourages mobility in almost all of the degrees on offer.

Several universities indicated that creating these sorts of degrees either meets the KPIs of certain staff or is part of institutional strategy.

The trend towards restructuring degrees to allow for increased mobility is further evidence that outbound mobility is a core part of internationalisation in Australian universities.
Section T:
Quality Assurance in Outbound Mobility

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas
Quality Assurance in Outbound Mobility

Quality assurance in outbound mobility in Australian universities most often takes place as part of the annual planning cycle.

Universities most commonly quality assure the following areas of their outbound programs:

- Partner institutions
- Services providers
- Short term programs
- Critical incident procedures
- Administrative procedures.

Whilst almost all institutions undertake some form of evaluation of the student experience (29 of 32 responding institutions indicated they undertake an evaluation of some sort), there doesn’t appear to be evidence of extensive quality assurance (i.e. systematic use of student feedback for improvement of quality) of the outbound student experience by Australian universities.

This is perhaps one of the next key evolutions in Australian outbound mobility.

The Process of Quality Assurance

Many tertiary providers use the PIRI cycle – Plan, Implement, Review and Improve – as an approach to quality assurance and continuous improvement.

The PIRI cycle works well with outbound mobility activities and is a simple way to reflect the necessary steps required for continuous improvement in a program, process or strategy.

Table: PIRI Model

<table>
<thead>
<tr>
<th>Plan</th>
<th>Implement</th>
<th>Review</th>
<th>Improve</th>
</tr>
</thead>
<tbody>
<tr>
<td>- establish the objectives and processes necessary to deliver results / program</td>
<td>- deliver on the agreed processes and programs</td>
<td>- monitor and measure processes and product / services against policies, objectives and agreed key performance indicators</td>
<td>- take action to improve the performance and future approach</td>
</tr>
</tbody>
</table>

Related Sections:

- Section Q: Re-Entry
- Section D: Outbound Mobility Planning
- Section H: Partnerships
Outbound Mobility Best Practice Guide for Australian Universities

Section U:
Glossary

This project was supported and funded by the Australian Government Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE) and prepared by AIM Overseas
There can be differences in the way different countries have come to use terms. There can even be differences in the way different institutions in one country have developed meanings for terms. These are definitions for the way the terms tend to be used in Australia. The purpose of the list below, however, is to explain the intended meanings in the Guide. It is not an attempt to impose national definitions.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>academic year</td>
<td>The annual period during which a student attends an educational institution. The academic year is usually divided into shorter study periods. In much of the northern hemisphere the academic year runs from usually from August/September to April / May / June. In the southern hemisphere the year is more uniform and corresponds roughly to the calendar year beginning in February / March to October / November.</td>
</tr>
<tr>
<td>academic/s</td>
<td>Scholars at a university who teach, research and may also have an administrative role. They can also be referred to as lecturers, professors or teaching staff. In North America they are most commonly known as ‘faculty’ to distinguish them from professional or administrative staff.</td>
</tr>
<tr>
<td>administrative staff</td>
<td>See ‘professional staff’</td>
</tr>
<tr>
<td>advanced standing</td>
<td>See ‘credit’</td>
</tr>
<tr>
<td>advisor</td>
<td>A professional or administrative staff member, usually, responsible for advising and guiding students on their mobility options and the processes necessary to undertake an overseas experience whether within the structure of their degree or outside of it. Titles sometimes used include: education abroad advisor; international education coordinator; mobility officer; and exchange advisor.</td>
</tr>
<tr>
<td>agent</td>
<td>In Australia this is usually an overseas stakeholder which recruits students on behalf of an institution for fee-paying degree or short-term study. The agent provides the student with program advice and administrative assistance applying to the host institution but little or no on-going assistance once accepted by the host institution. An agent is usually paid a commission by the university.</td>
</tr>
<tr>
<td>agreement</td>
<td>See ‘Memorandum of Understanding’ or ‘exchange agreement’</td>
</tr>
<tr>
<td>AUIDF</td>
<td>Australian Universities International Directors’ Forum, established in 2002, it is composed of the international directors from the 38 universities in Australia. One of its first activities was to attempt to benchmark international operations of Australian universities. This has been the hallmark of the Forum since.</td>
</tr>
<tr>
<td>Australian Universities International Directors’ Forum</td>
<td>See ‘AUIDF’</td>
</tr>
<tr>
<td>average</td>
<td>An academic score which is the mean of the student’s total marks or grades to date used to indicate the academic performance. Often used as a requirement for students to be allowed to participate in mobility programs by either the home or host institution. Particular types of averages used in different parts of the world include the ‘Grade Point Average’ and the ‘Weighted Average Mark’.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>--------------</td>
<td>--------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>award</td>
<td>A ‘degree’, ‘diploma’ or ‘certificate’. Also, acknowledgment by a university of having achieved some significant goal such as best student in a particular discipline in a year. <em>Synonym:</em> prize</td>
</tr>
<tr>
<td>bonus</td>
<td>See ‘grant’</td>
</tr>
<tr>
<td>bulletin</td>
<td>See ‘handbook’</td>
</tr>
<tr>
<td>bursary</td>
<td>See ‘grant’</td>
</tr>
<tr>
<td>calendar</td>
<td>See ‘handbook’</td>
</tr>
<tr>
<td>catalogue</td>
<td>See ‘handbook’</td>
</tr>
<tr>
<td>certificate</td>
<td>A prescribed course of study awarded by a tertiary institution but of shorter duration than a diploma or degree.</td>
</tr>
<tr>
<td>class</td>
<td>See ‘unit’ but can also be the period of time being taught.</td>
</tr>
<tr>
<td>co-op</td>
<td>A largely North American term which refers to programs that normally alternate study periods at the home institution with paid or unpaid industry placements. The ‘co-op’ time refers to the time in the workplace.</td>
</tr>
<tr>
<td>course</td>
<td>See ‘degree’ but can also be used to refer to a ‘unit’.</td>
</tr>
<tr>
<td>coursework degree</td>
<td>Completion of a prescribed course of study involving a number of related units from a particular discipline, in contrast to a research degree, although it may also contain a unit concerned with research.</td>
</tr>
<tr>
<td>credit</td>
<td>Recognition of an international study experience as fulfilling part of the academic requirements by counting an agreed number of points towards a student’s degree at the home university. It can also be for activities that were not specifically completed as part of the current degree but in previous study which is then deemed to have met some of the requirements of the student’s current degree. Can sometimes be referred to as ‘credit for previous study’ or ‘credit for prior learning’. <em>Synonym:</em> advanced standing</td>
</tr>
<tr>
<td>debriefing</td>
<td>An activity, or series of activities, to assist students returning from student mobility experiences to re-integrate into their home institution and contextualise their experience. <em>Synonym:</em> re-entry</td>
</tr>
<tr>
<td>degree</td>
<td>Usually awarded in recognition of the recipient having either satisfactorily completed a prescribed course of study or having conducted a scholarly endeavour deemed worthy of his or her admission to the degree. Degrees can be by ‘research’ or ‘coursework’ or a combination of both. A degree can also be referred to as a ‘course’ or a ‘program’.</td>
</tr>
<tr>
<td>diploma</td>
<td>A prescribed course of study awarded by a tertiary institution but of shorter duration than a degree.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>double degree</td>
<td>Two degrees studied concurrently at one university in a reduced timeframe i.e. where some units studied count towards both degrees reducing the time taken to less than that it would take to study them separately. It can also be known as a combined degree.</td>
</tr>
<tr>
<td>dual degree</td>
<td>An arrangement where a student obtains two degrees from two separate institutions. Most commonly universities recognise some study at the other as meeting their requirements so that the students complete two degrees in less time than it would take to do them separately. Not to be confused with a ‘joint degree’.</td>
</tr>
</tbody>
</table>
| Education Services for Overseas Students Act | Education Services for Overseas Students (ESOS) Act sets out the legal framework governing delivery of education to overseas students studying in Australia on a student visa including:  
  • the registration process obligations of registered providers  
  • ESOS Assurance Fund; and  
  • enforcement and compliance powers. |
<p>| ESOS Act                    | See ‘Education Services for Overseas Students Act’                                                                                                                                                    |
| exchange                    | Sending to and receiving students from an overseas institution which is facilitated by a formal written agreement that specifically mentions arrangements concerning tuition fee waivers and credit transfer amongst other things. |
| exchange agreement          | Agreement between two or more institutions articulating the terms of student exchange that include provision for tuition fee waiver, the responsibilities of the parties and credit transfer. |
| exchange balance            | The number of inbound places compared with the number of outbound places to and from an exchange partner institution at any one time. It may be measured in semester places or full-time equivalent (FTE) places. |
| exchange unit               | A shell unit into which outbound exchange students are enrolled which has fees attached.                                                                                                               |
| externship                  | See ‘internship’                                                                                                                                                                                          |
| fair                        | An event, usually arranged by an institution for its students, that profiles outbound mobility possibilities. It can sometimes be referred to as an exchange or student mobility fair. Other types of fairs can be arranged by third parties for the purpose of recruiting students to study at attending or represented institutions, usually overseas for the payment of fees and are known as recruitment fairs. |
| for recognition             | An activity undertaken that does not attract credit at the home institution, but that is accounted for in some other way e.g. as part of a leadership program.                                                     |
| free mover                  | A term commonly used in Europe for individual students undertaking a student mobility experience at a non-exchange partner institution. It may or may not involve the payment of tuition fees to the host institution. It is sometimes used as a synonym for ‘study abroad’ in Europe. |</p>
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>full time equivalent (FTE)</td>
<td>The unit to measure students in a way that makes them comparable although they may study a different number of hours per week. An FTE of 1.0 means that the student is equivalent to one full-time student for a year while an FTE of 0.5 signals that the student is studying the equivalent to one semester or half a year of study.</td>
</tr>
<tr>
<td>general staff</td>
<td>See ‘professional staff’</td>
</tr>
<tr>
<td>global ‘leadership’ program</td>
<td>A program, normally extracurricular, comprising of a series of activities designed to foster intercultural understanding and skills. Participants receive some form of non-academic recognition (such as a certificate, or acknowledgment on their transcript) from their institution upon successful completion of requirements. Can also be referred to as a global citizenship program.</td>
</tr>
<tr>
<td>GPA</td>
<td>grade point average, see ‘average’</td>
</tr>
<tr>
<td>grade point average</td>
<td>See ‘average’</td>
</tr>
<tr>
<td>grant</td>
<td>Funding provided to a student to support a student mobility experience. <em>Synonyms:</em> scholarship, bursary, bonus</td>
</tr>
<tr>
<td>handbook</td>
<td>The annual listing of units available at an institution. <em>Synonyms:</em> calendar, catalogue, bulletin</td>
</tr>
<tr>
<td>honours</td>
<td>Usually an optional year of additional study for students of high academic ability at the end of the standard bachelor’s degree. It involves several units and completion of a research thesis in a particular discipline.</td>
</tr>
<tr>
<td>hurdle requirement</td>
<td>A requirement that a student must satisfy in order to complete their degree e.g. a student who must do a placement in industry related to their studies. Hurdle requirements might be for credit or not for credit.</td>
</tr>
<tr>
<td>internship</td>
<td>A period of work experience recognised in some way by the home institution. Internships may be paid or unpaid, and either for the purposes of receiving credit or not. <em>Synonym:</em> externship</td>
</tr>
<tr>
<td>joint degree</td>
<td>A study program that is jointly developed and recognised by several institutions. Students at participating institutions spend part of their studies at two or more of the universities where the studies are recognised by all parties sometimes with shared teaching by staff between the institutions. At end of the process the student receives a degree which is conjointly conferred, that is a testamur with two or more institution names and crests on it, the so-called double badged degree. Not to be confused with a ‘dual degree’.</td>
</tr>
<tr>
<td>language acquisition</td>
<td>Undertaking study overseas in the local language for the purpose of advancing knowledge of and ability to speak the language.</td>
</tr>
<tr>
<td>language of instruction</td>
<td>The language in which classes at an institution are taught.</td>
</tr>
<tr>
<td>leave of absence</td>
<td>A period for which a student has been approved to suspend enrolment in study for their degree. In the case of this Guide, it is specifically to undertake an international student mobility experience.</td>
</tr>
<tr>
<td><strong>memorandum of understanding</strong></td>
<td>(MOU) Overarching agreement between two or more institutions / organisations indicating an intention to collaborate in one or more ways.</td>
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<tr>
<td><strong>module</strong></td>
<td>See ‘unit’</td>
</tr>
<tr>
<td><strong>MOU</strong></td>
<td>See ‘memorandum of understanding’</td>
</tr>
<tr>
<td><strong>non-award</strong></td>
<td>Any student mobility program, inbound or outbound, that does not result in the award of a degree from the host institution.</td>
</tr>
<tr>
<td><strong>not for credit</strong></td>
<td>An activity undertaken overseas which may or may not be recognised by the home institution but does not result in the awarding of credit to the student’s degree. See also ‘hurdle requirement’.</td>
</tr>
<tr>
<td><strong>not for recognition</strong></td>
<td>An activity that attracts neither credit nor recognition at the home institution.</td>
</tr>
<tr>
<td><strong>orientation</strong></td>
<td>Activities undertaken in-country to familiarise students with their local environment, culture and details of their student mobility experience. These may be organised by the host institution when the students first arrive on campus or by the agent/provider. In Australia the host institution is obliged by law to provide an orientation session to all incoming students from overseas.</td>
</tr>
<tr>
<td><strong>OSHC</strong></td>
<td>See ‘Overseas Student Health Cover’</td>
</tr>
<tr>
<td><strong>OS-HELP</strong></td>
<td>A loan scheme introduced by the Australian government in 2005 to assist students with travel overseas for study. The loan is only available to Australian citizens or students on humanitarian visas who have a Commonwealth supported place as it is added to the debt for repayment at a later stage. For more information see <a href="http://www.goingtouni.gov.au/Main/Quickfind/StudyOverseas/OSHELP.htm">www.goingtouni.gov.au/Main/Quickfind/StudyOverseas/OSHELP.htm</a></td>
</tr>
<tr>
<td><strong>outbound</strong></td>
<td>A student from her/his home institution going overseas. <em>Synonyms</em>: outward, outgoing.</td>
</tr>
<tr>
<td><strong>outgoing</strong></td>
<td>See ‘outbound’</td>
</tr>
<tr>
<td><strong>outward</strong></td>
<td>See ‘outbound’</td>
</tr>
<tr>
<td><strong>Overseas Student Health Cover</strong></td>
<td><em>(OSHC)</em> The health insurance that the Australian government requires incoming exchange and study abroad students to have when studying on a student visa in Australia. Exceptions are students from Belgium, Norway and Sweden.</td>
</tr>
<tr>
<td><strong>overseas unit</strong></td>
<td>A unit approved and taught by a university which is delivered in whole or in part overseas often in an intensive format. The academic content delivered overseas might be by an accompanying academic or with collaboration from local institutions and organisations. The assessment may not be due until some time in the near future on return from overseas.</td>
</tr>
<tr>
<td><strong>parity</strong></td>
<td>See ‘reciprocity’</td>
</tr>
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<tr>
<td>partner</td>
<td>An overseas institution or organisation with which a relationship, formalised by an agreement, has been developed for one or more reasons.</td>
</tr>
<tr>
<td>placeholder</td>
<td>See ‘shell unit’</td>
</tr>
<tr>
<td>placement</td>
<td>A period of field work or practical training under formal supervision often as a volunteer to meet the academic requirements for professional accreditation in their home country. Most commonly in the fields of health and education but also business and engineering and in this context completed overseas.</td>
</tr>
<tr>
<td>pre-departure</td>
<td>Process by which students are prepared by their home institution prior to their sanctioned mobility experience. Pre-departure often includes information on health and safety, cultural issues, administrative and other practical issues to ensure students have a successful time overseas. Pre-departure preparation may also include the issuing of a guide (printed or electronic) for students to take with them.</td>
</tr>
<tr>
<td>prize</td>
<td>See ‘award’</td>
</tr>
<tr>
<td>professional staff</td>
<td>University staff that do not have an academic role in the institution. Also referred to as general or administrative staff.</td>
</tr>
<tr>
<td>program</td>
<td>See ‘degree’</td>
</tr>
<tr>
<td>provider</td>
<td>Sometimes referred to as a ‘program’ or ‘third-party provider’, in Australia this is usually, but not always, an overseas stakeholder which recruits students on behalf of an institution for fee-paying degree or short term study. In addition, however, to assisting the student with the administration of applying to the host institution, the provider also offers other services such as visa application assistance, airport pick-up, orientation and other ongoing support during the course of the overseas study period. The provider can be paid a fee by the student, or is paid a ‘fee for service’ by the university.</td>
</tr>
<tr>
<td>quarter</td>
<td>See ‘study period’</td>
</tr>
<tr>
<td>reciprocity</td>
<td>Principle of the movement of equal numbers of students under the auspices of an exchange agreement. Reciprocity is usually aimed for over the life of the agreement, not simultaneously or annually. Synonym: parity</td>
</tr>
<tr>
<td>re-entry</td>
<td>See ‘debriefing’</td>
</tr>
<tr>
<td>research degree</td>
<td>The search for knowledge, or any systematic investigation, with an open mind, to establish novel facts, solve new or existing problems, prove new ideas, or develop new theories and formalised in the completion of a thesis or project for the purpose of being admitted to a higher degree. Research may involve components of international experience, such as attending conferences, completing field work or working with experts in overseas locations.</td>
</tr>
<tr>
<td>scholarship</td>
<td>See ‘grant’</td>
</tr>
<tr>
<td>semester</td>
<td>See ‘study period’</td>
</tr>
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<td>Term</td>
<td>Definition</td>
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</tr>
<tr>
<td>service learning</td>
<td>See ‘volunteering’</td>
</tr>
<tr>
<td>shell unit</td>
<td>A generic code used to enrol a student at their home institution while they are undertaking an overseas study experience. The shell unit has no specific content of its own and may or may not have credit and fees attached to it. <em>Synonym:</em> placeholder</td>
</tr>
<tr>
<td>short term program</td>
<td>Period of study overseas of less than a semester in duration which may or may not result in the transfer of credit to count towards the student’s home degree. It can be as an exchange, study abroad, study tour, internship or placement and often occur outside the standard semester times at the home institution in summer or winter.</td>
</tr>
<tr>
<td>student agreement</td>
<td>An document that outbound students must sign which outlines the terms and conditions by which they must abide while participating in the period of student mobility overseas.</td>
</tr>
<tr>
<td>study abroad</td>
<td>Study experiences overseas where tuition fees are paid at the host institution which may require a leave of absence at the home institution, and the transfer of credit to count towards the student’s home degree may or may not be a consideration on the student’s return. In some parts of the world, particularly in North America it may be used to refer to both ‘exchange’ and fee-paying ‘study abroad’ students.</td>
</tr>
<tr>
<td>study period</td>
<td>That length of time which has been allotted to study in the course of the academic year. Most Australian universities use a semester (from the Old high German meaning ‘six months’) system, with two semesters in a year. Other study periods include: ‘trimesters’, three study periods in a year; ‘terms’, this may be two or three study periods in a year; and ‘quarters’, four periods of which only three are study periods. These periods may be named by numbers (1, 2, etc), the seasons (fall/autumn, winter, spring) or in older institutions by names with religious significance (Michaelmas, Christmas, Easter, Trinity, etc). Non-standard study periods may also be available in the summer and winter. For the purposes of this Guide, study periods will be defined as: ‘Semester 1’, first half of the year; ‘Semester 2’, second half of the year; ‘summer’, from December-February; and ‘winter’, from June-July. The authors acknowledge that this terminology will not match every institutions’ definition of study periods.</td>
</tr>
<tr>
<td>study plan</td>
<td>The map of a student’s intended overseas units of study for credit at the home institution.</td>
</tr>
<tr>
<td>study tour</td>
<td>A university-sanctioned overseas short term study experience for a group of students lead by an academic as teacher and/or facilitator and organised by the institution or a third party.</td>
</tr>
<tr>
<td>subject</td>
<td>See ‘unit’</td>
</tr>
<tr>
<td>summer unit</td>
<td>A period of study, the name of which is defined by the location, e.g. a summer unit in France would be taught in the June-August period but in Chile it would be January-February.</td>
</tr>
<tr>
<td>target language</td>
<td>The language it is intended a student learn.</td>
</tr>
<tr>
<td>term</td>
<td>See ‘study period’</td>
</tr>
<tr>
<td><strong>trimester</strong></td>
<td>See ‘study period’</td>
</tr>
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<tr>
<td><strong>unit</strong></td>
<td>A course of study about a detailed topic over a specified part of the academic year which counts as stated number of units towards the totalled required for a degree. It can also be referred to as a ‘module’, ‘subject’, ‘class’ or ‘course’.</td>
</tr>
<tr>
<td><strong>volunteering</strong></td>
<td>A university-sanctioned international education related experience, often working for not-for-profit organisations in the community, that does not attract any financial gain for the student or the institution. <em>Synonym</em>: service learning</td>
</tr>
<tr>
<td><strong>WAM</strong></td>
<td>Weighted average mark, see ‘average’</td>
</tr>
<tr>
<td><strong>weighted average mark</strong></td>
<td>See ‘average’</td>
</tr>
<tr>
<td><strong>winter unit</strong></td>
<td>A period of study, the name of which is defined by the location, e.g. a winter unit in Germany takes place in the January-February period but in South Africa it would be June-August.</td>
</tr>
</tbody>
</table>

The *Forum on Education Abroad* has produced a comprehensive, although North American-centric, glossary of terms. As of August 2011, this is available at: [www.forumea.org/EducationAbroadProgramFeaturesandTypes.cfm](http://www.forumea.org/EducationAbroadProgramFeaturesandTypes.cfm)