

WESTERN OREGON

UNIVERSITY

Establishing
International
Exchanges

OFFICE OF
STUDY ABROAD
AND
INTERNATIONAL
EXCHANGES

Introduction: Basic Steps in Establishing Exchanges

The information and materials in this guide will support initiatives on the Western Oregon University campus to establish and renew international exchange agreements between Western Oregon University and institutions outside the United States.

Initiators of international exchange agreements are asked to follow the information guide and to inform the Office of Study Abroad and International Exchanges of any new proposed agreements. This process permits the Office of Study Abroad and International Exchanges to document and assess the impact of exchange programs on the University's international mission and to make recommendations to the Provost and the International Education and Services Committee. Most importantly, the guidelines help ensure that exchange agreements are consistent with university policies governing international education.

Basic Steps:

1. Consider the information in this guide, and plan accordingly.
2. Consult with the Office of Study Abroad and International Exchanges as you develop the exchange agreement. Note that the Office of Study Abroad and International Exchanges can provide information about existing agreements and can facilitate appropriate central administration approval and signatures for a formal, written agreement that meets Oregon Department of Justice and Oregon University System guidelines.
3. Submit proposal to the International Education and Services Committee of the faculty senate for review and recommendation to the Provost.
4. If endorsed by the International Education and Services Committee, forward agreement to the Provost.

Preliminary Considerations

International activities and academic mobility occur without formal linkages and exchanges, and they are encouraged wherever those relationships fulfill the University's mission of teaching, research, and service. Developing and maintaining institutional relationship beyond individual academic interests and connections, however, requires planning and commitment of financial and human resources.

Rationale. Initially it is important to address academic benefits to Western Oregon University and to identify the home and partner institutions' strengths relative to the proposed exchanges. The linkage should fit within the mission of Western Oregon University and offer comparative advantage in relationship to other exchange programs. Faculty are advised to consider whether there are existing exchanges in force in the same country or region and the relationship of proposed exchanges to ongoing relationships.

Planning and matching interests with the foreign institution. Mutual benefit is the key to successful international linkages. Exchanges should match the appropriate institutional level; that is, departments and colleges should assess participant expectations at both institutions to make sure that a Western Oregon University interest in a foreign university's humanities faculty, for example, is not met by an interest from the foreign institution's engineering faculty.

Financial support. Many Western Oregon University exchanges require no external funding and rely on the reciprocity principle (i.e. tuition waivers, room and board, etc.). Current Oregon legislative limits on tuition waivers and human resources, however, make new agreements difficult to implement. Although there may be no cash outlay other than travel support, the in-kind contributions and repercussions of office space and administrative support should also be considered.

Steps for Establishing International Exchanges

- Establish initial contact and preliminary support to begin discussion
- Indicate whether an oversight or selection committee is warranted and, if so, its composition and responsibilities
- Establish mutual agreement regarding benefits of exchanges.
- Secure commitment and required resources
- Agree upon expectations
- Develop plans for implementation
- Determine size and scope of exchanges (Is it reciprocal? Should the exchanges balance on an annual basis, etc.)
- Establish mutual agreement regarding interests and scope of exchange.
- Determine financial implications and obligations, including institutional support for faculty salaries and benefits, in-kind support (tuition waivers, office space), currency restrictions and cost of living standards of the other country, outside funding sources, immigration fees, etc.
- Establish participant selection criteria established (both students and faculty)
- Determine required academic qualifications of participants, including curriculum adjustments, level of language proficiency, academic credit transfer issues (for students).
- Determine review and evaluation process.
- Establish accountability and administrative procedures.

- Finalize protocols/written agreement and work plan.

Developing a Written Exchange Agreement

Experience indicates that considering the following elements helps to avoid misunderstanding and supports the successful completion of an exchange.

Preamble. This initial section identifies the parties involved in the exchange, their commitment to the program, and a rationale for the agreement. This section can include mutual objectives and expected benefits.

Procedural elements. Include each of the following components:

- Identify the language(s) of formal communication.
- Specify the duration of agreement: date effective and proposed termination. Note probation or renewal period if applicable.
- Indicate whether an annual work protocol is desirable.
- Specify data collection, record maintenance, and reporting procedures.
- Describe provisions for renewal and negotiation. Specify conditions and means of notification. Identify plan for regular mutual review and evaluation.
- Indicate method of announcing, publicizing, and recruiting for exchanges.
- Identify the method for terminating the agreement, including release clause, with a specified time period between notice and withdrawal from the program.
- Identify appropriate signing parties.

Faculty Exchanges

Annual Work Protocol

Consideration of the following elements and their inclusion in a written protocol helps to avoid misunderstanding and supports the successful completion of an exchange.

Identification of participants. Identify participants for the period covered by the protocol. Specify:

- Minimum and maximum number
- Duration of stay
- Fields/Departments
- Language proficiency requirement and evaluation
- Selection criteria
- Application procedures
- Implication on employment, salary, fringe benefits, promotion and tenure
- Curriculum/workload adjustments, including provisions for replacement of faculty abroad.

Host obligations. Preparing for International Scholars. The host department should clarify or arrange the following:

- Pre-arrival responsibilities
- Access to academic research and resources
- Confirmation of financial obligations as agreed upon, and method of payment for housing, travel,
- Health insurance, immigration fees, board, computer fees, teaching and research materials, etc.
- Preparation of appropriate government documents in order to secure appropriate visas and ensure the scholar can receive pay.
- Living arrangements and social conditions, including provisions by academic departments
- Post-departure responsibilities

Participant obligations. Although the exchange appointment should specify terms, each faculty member is advised to confirm the following:

- Nature and terms of assignment (duration; expectation of academic contribution abroad, e.g. teaching, research, lectures, study, technical assistance, consulting and advising, public service work/internship, institution building, professional development)
- Financial obligations and method of payment for housing, travel, health insurance, board, computer fees, teaching and research materials, etc.
- Responsibility for living arrangements and social conditions including provisions for dependents
- Other personal or professional pre-departure responsibilities
- Home institution expectations of returnee

Informal Exchanges

Although the Office of Study Abroad and International Exchanges needs to be informed of all departmental activities abroad, the following types of international academic exchanges do not need to be documented by official exchange agreements.

- Ad hoc faculty visits to foreign institutions for lecturing or research
- Fulbright teaching or research awards or individual sabbaticals and teaching or research leaves

Student Exchanges

Reciprocal student exchange opportunities can often be worked into general university-to-university exchanges agreements. The Office of Study Abroad and International Exchanges can provide assistance to departments and colleges

setting up programs that will allow students to earn credit.

If a department is interested in establishing a study abroad program the Office of Study Abroad and International Exchanges can also assist.

Approval Process

If the proposed exchange is intended at the department or college level, the Dean, Provost, and President will be the final approving authorities for any resources committed or agreements made on behalf of the department or college.

The Office of Study Abroad and International Exchanges can provide sample agreements and also provide appropriate feedback. Once finalized or signed, all agreements should be reviewed by the Oregon Department of Justice and the Oregon University System for inclusion in the University's international list.