



# **Policy and Guidance on providing education with others**

**Education Committee**

**Valid from March 2023**

## Contents

1.	Introduction.....	1
2.	Definition and scope .....	1
3.	Taught collaborative courses .....	2
4.	Collaborations involving postgraduate research students.....	4
5.	Minor collaborations.....	5
6.	International placements: student exchanges, language placements and years abroad.	5
7.	Integrated professional placements.....	9
8.	Register of collaborative agreements.....	10
9.	Monitoring and review of this policy.....	10
	Annex A: Guidance on developing a proposal for a collaborative programme .....	11
	Annex B: Guidance on setting up student exchanges .....	13

## Version history

1.0	Mar 2015	Original publication	Approved by Quality Assurance Subcommittee
1.1	Sept 2015	Minor changes	Approved by Chair's action
1.2	Sept 2016	Addition of annex and minor change	<p>Addition of:</p> <ul style="list-style-type: none"> <li>• terms of the reviews of collaborative arrangements (para 3.14-5)</li> <li>• 'Medical Sciences Division' (para 4.14)</li> <li>• information on delegated signatory authority (para 8.1)</li> </ul> <p>Approved by Quality Assurance Subcommittee</p>
1.3	March 2023	Minor changes	<ul style="list-style-type: none"> <li>• Update of external reference points to include the Office for Students' Regulatory Framework and the current Quality Code published by the QAA</li> <li>• Removal of references to the Erasmus scheme</li> <li>• Inclusion of reference to a minimum period abroad (para 6.3)</li> <li>• Inclusion of signposting to fieldwork-related safety training (footnote in para 6.11)</li> <li>• Inclusion of reference to template placement written agreement (para 6.23)</li> <li>• Update of web links</li> <li>• Inclusion of web links to referenced regulations, policies and guidance</li> <li>• Update of contact details and obsolete references</li> </ul> <p>Approved by the Chair of Quality Assurance Subcommittee</p>

## **1. Introduction**

- 1.1. Responsibility is delegated to Education Committee on behalf of Council for:
- undergraduate and taught postgraduate course structure and curriculum design;
  - teaching, learning and assessment;
  - structure of doctoral programmes;
  - approval of new courses; and
  - collaborative provision.

(Council Regulations 15 of 2002, Section 2.3 (c), (d) (e), (f) and (i)<sup>1</sup>).

- 1.2. This document sets out Education Committee's policy on all forms of collaboration and partnership which relate to the University's academic awards. It takes into account the Office for Students Regulatory Framework<sup>2</sup>, and the Quality Code and the expectations and practices for partnerships published by the QAA<sup>3</sup>.

## **2. Definition and scope**

- 2.1. The scope of this document reflects that of the following Quality Code expectations for standards and quality core practices:

Where a provider works in partnership with other organisations, it has in place effective arrangements to ensure that the standards of its awards are credible and secure irrespective of where or how courses are delivered or who delivers them.

Where a provider works in partnership with other organisations, it has in place effective arrangements to ensure that the academic experience is high-quality irrespective of where or how courses are delivered and who delivers them.

- 2.2. The University currently engages in five broad categories of 'education with others', around which the following policy and guidance has been arranged:
- a) taught collaborative courses;
  - b) collaborations involving postgraduate research students;
  - c) minor collaborations (involving limited teaching or the use of specialist facilities and resources);
  - d) international placements: student exchanges, language placements and years abroad; and
  - e) integrated and professional placements.
- 2.3. This document does not cover:
- programmes or courses which do not lead to a qualification of the University;

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<sup>1</sup> <https://governance.admin.ox.ac.uk/legislation/part-2-education-committee-of-council-regulations-15-of-2002>

<sup>2</sup> [Securing student success: Regulatory framework for higher education in England - Office for Students](https://www.officeforstudents.org.uk/publications/securing-student-success-regulatory-framework-for-higher-education-in-england/) <https://www.officeforstudents.org.uk/publications/securing-student-success-regulatory-framework-for-higher-education-in-england/>

<sup>3</sup> [Partnerships \(qaa.ac.uk\)](https://www.qaa.ac.uk/en/the-quality-code/advice-and-guidance/partnerships) <https://www.qaa.ac.uk/en/the-quality-code/advice-and-guidance/partnerships>

- contributions academic staff may make to programmes of other universities and institutions;
- placements, internships etc. which take place outside of the formal curriculum;
- arrangements for visiting students;
- arrangements for staff exchanges (incoming or outgoing); and
- arrangements with individuals to provide teaching on University courses (arrangements with organisations are covered under 'Minor collaborations' in section 5).

### **3. Taught collaborative courses**

- 3.1. A taught collaborative course is defined as a course where all or a significant proportion of responsibility for design, teaching, assessment or management are delegated to a body outside the collegiate University.
- 3.2. The quality of education provided by the University is closely linked to the physical collegiate and departmental/faculty communities of which it is formed. Reflecting this, it is expected that the majority of students' time will be spent in Oxford and that the majority of programmes will be taught by academic staff who are members of the collegiate University. The University therefore engages in a very small number of taught collaborative courses and is unlikely to expand activity in this category.
- 3.3. Any proposals coming forward for new collaborative programmes would be expected to meet the policy expectations outlined in this section.

#### ***Strategic approach***

- 3.4. Proposals for collaborative courses should:
  - result from existing relationships between academics and administrators and their colleagues at other institutions, building from a 'bottom up' desire for collaboration and existing familiarity derived from research relationships;
  - involve partner departments and institutions of international standing or unique capability in the relevant subject;
  - demonstrate a clear strategic rationale for pursuing the opportunity which relates to the added value of the collaboration for the University. This may relate to one or more of the following objectives:
    - to attract the best students to Oxford;
    - to deliver an outstanding educational experience for our students;
    - to enhance the quality of our research by strengthening research collaborations; or
    - to attract and retain the best academic staff.

#### ***Academic rationale***

- 3.5. Underpinning any proposal for a collaborative programme must be a strong academic case which clearly demonstrates why collaboration is necessary to achieve the strategic and educational objectives of the programme.

### *'Joint' degrees*

- 3.6. The University has previously established a limited number of joint awards with other institutions, however it has agreed that in general it would not seek to enter into any further collaborative arrangements which involve the award of a degree in concert with an award of another degree-awarding body (either jointly or separately resulting in a 'double' or 'dual' award). This decision is based on the principle that students of the University should not receive two degrees for the same piece of work, and that collaborative programmes should have only one degree-awarding institution.

### ***Sustainability and viability***

- 3.7. To be successful, collaborative programmes must be managed by a designated academic lead who has the capacity to undertake the development and ongoing management of the programme. Sufficient wider academic and administrative resources must also be available. Proposals should identify the full teaching and administration resources required, and then cover how income and costs will be distributed between the University and the partner organisation.

### ***Robust scrutiny***

- 3.8. Prior to any extensive development work an initial written proposal should be submitted by the faculty or department to the division and then for approval by or on behalf of Education Committee. For international collaborations the International Engagement Office ([international.engagement@admin.ox.ac.uk](mailto:international.engagement@admin.ox.ac.uk)) should also be consulted.
- 3.9. After that initial decision, and further development work, all new collaborative programmes should then undergo an appropriately adapted form of new course scrutiny. Conversion of an existing course into a collaborative programme would be considered a major change and be subject to appropriate scrutiny. In addition to the normal requirements for all new courses, the proposal should include details of how the programme would operate and be managed, and the division of responsibilities between the parties. Guidance on what should be included in the proposal (in addition to the information required for a new course or major change) is given in Annex A.
- 3.10. Relevant due diligence investigations of the proposed partner organisation should be undertaken including, where appropriate, a site visit by the academic lead and relevant divisional and Education Policy Support officers.
- 3.11. Responsibility for final approval rests with Education Committee which should receive a final proposal consisting of a cover document, course approval documentation, a report on the due diligence investigations and a draft legal agreement. The collaboration will be entered on to the Register of collaborative agreements once it has received approval.

### ***Management, monitoring and review***

- 3.12. All collaborative programmes should be the subject of a comprehensive and formal written legal agreement reviewed by Legal Services and Education Policy Support.

- 3.13. Programmes would be approved for a finite duration (3-5 years in the first instance), and the programme and collaboration should be monitored by the department or faculty on an annual basis.
- 3.14. A systematic review, organised by the division, should take place in the final year of the initial approval period and every five years thereafter, ideally timed to co-ordinate with the renewal of the written agreement. The review should include a review of the collaborative courses and a comprehensive review of the operation of the partnership.
- 3.15. In addition to the normal terms of reference for a course review this would include review of:
  - whether the collaborative arrangement still fits with the strategies of the department, the division and the University;
  - whether the course/programme and partnership is being operated in accordance with its legal agreement;
  - whether the legal agreement is still fit for purpose;
  - the current division of responsibilities, and the continuing appropriateness of the allocation of responsibilities devolved to or shared with the partner;
  - the comparability of the student experience with Oxford students on non-collaborative courses/programmes;
  - whether the course is operating in line with current policy requirements (i.e. student representation, course information, feedback on assessment etc.) and if there are clear mechanisms for communicating these to the partner;
  - the accuracy and completeness of published information about the course and the relationship and division of responsibilities between the University and the partner;

#### **4. Collaborations involving postgraduate research students**

- 4.1. The University has in place a number of arrangements where part of the responsibility for supervision, providing training or facilities for postgraduate research students is delegated to a body outside the collegiate University. These involve universities, others types of organisations engaged in research, and industrial partners. They may take a variety of forms, including collaborative Centres for Doctoral Training and split-site DPhils.
- 4.2. In terms of the policy requirements, proposals for collaborations involving postgraduate research students are expected to meet the same set of policy requirements as for taught collaborative programmes given above.
- 4.3. In addition proposals would be expected to pay particular attention to:
  - the division of supervisory responsibilities between the partner organisation and the university, and the training of staff involved in supervision at the partner organisation if not part of their normal duties;
  - arrangements for monitoring of student progress, including confirmation and transfer;
  - provision for skills training; and
  - arrangements for the submission of thesis and examination.

### **Study in a 'well-founded laboratory'**

- 4.4. Provision exists within the University's Examination Regulations<sup>4</sup> for students in the Mathematical, Physical and Life Sciences and Medical Sciences Divisions to undertake their research in a 'well-founded laboratory' outside of the University. These arrangements are not included on the central register of collaborations but should be recorded on a local register by the department or faculty and are subject to divisional approval.

## **5. Minor collaborations**

- 5.1. It would be disproportionate to subject arrangements with another organisation for the provision of teaching or facilities that contribute to a small and specialised aspect of a course to the same level of scrutiny as major collaborative programmes.
- 5.2. The following policy expectations apply to these 'minor collaborations'.
- appropriate due diligence should be undertaken with regard to the partner organisation, particularly focusing on its ability to resource the required support for the collaboration;
  - any staff intending to teach on the programme should be formally approved by an appropriate body within the department or faculty, prior to the commencement of teaching;
  - key points of contact should be identified and a plan for managing the relationship adopted, particularly focusing on communication regarding students and quality assurance;
  - contingency plans should be in place should the partner organisation default on its obligations, to ensure that students are still able to complete their course; and
  - an appropriate written agreement, which may take a variety of forms ranging from an exchange of emails to a formal contract (to be reviewed by Legal Services) depending on the nature of the arrangement, should be in place and should be submitted to Education Policy Support for addition to the Register of collaborative agreements.

## **6. International placements: student exchanges, language placements and years abroad**

- 6.1. The University has in place a wide range of international placement arrangements involving study or experience abroad for students as part of their degree programme.
- 6.2. For some programmes placements are compulsory and 'built in' to the structure of the programme, for other programmes they are offered as an optional element within a programme of study.

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<sup>4</sup> [Research Degrees in the Mathematical, Physical and Life Sciences Division \(ox.ac.uk\)](https://examregs.admin.ox.ac.uk/Regulation?code=rdtm-palifesciedivi)  
[https://examregs.admin.ox.ac.uk/Regulation?code=rdtm-palifesciedivi](https://examregs.admin.ox.ac.uk/Regulation?code=rditmedisciedivi)  
[Research Degrees in the Medical Sciences Division \(ox.ac.uk\)](https://examregs.admin.ox.ac.uk/Regulation?code=rditmedisciedivi)  
<https://examregs.admin.ox.ac.uk/Regulation?code=rditmedisciedivi>

6.3. With regard to assessment, arrangements may:

- be for a period of study or work experience only – a student has to complete a minimum period abroad but is not assessed on their performance while away e.g. year abroad in modern languages programmes;
- operate on a pass/fail basis – a student has to pass their placement on the terms of their host organisation e.g. year abroad in BA in Law with Law Studies in Europe; or
- contribute to classification – a student's performance during placement/student exchange will have a direct impact on their degree classification e.g. final year exchange for MEng students. In many cases this will involve their host organisation assessing work directly, but this category also covers situations where completion of a piece of assessed work is dependent on the support and facilities available at a host organisation e.g. Princeton exchange for final year MBiochem students.

6.4. International placements can be structured (where a student follows an agreed course of study or research at another university or research institution) or unstructured (primarily for practical experience, such as some language placements).

6.5. The core policy framework as outlined below applies to all types of international placement. Detailed guidance on setting up student exchanges is provided in Annex B.

### ***Clear objectives***

6.6. When a new placement is introduced, as part of an existing course or as part of a new course, the role of the placement in contributing to the learning outcomes of the course should be clearly identified and the academic rationale for its introduction clearly explained.

6.7. Students on structured placements should have their course of study or research agreed by a designated member of academic staff to ensure they will meet the overall objectives of the placement. Students on unstructured placements should have in place a plan for their personal development during the placement; this plan should be agreed by a designated member of academic staff.

### ***Leadership and support***

6.8. All courses with placements should have an academic lead and sufficient administrative support to ensure the smooth running of the placement arrangements. The division of roles and responsibilities between staff involved in placements should be clearly identified, including the role of staff in colleges.

### ***High quality experience for all***

6.9. Departments and faculties are responsible for ensuring that students undertake high quality placement activities which enable them to fulfil the learning outcomes identified for the placement.

6.10. For placements involving the regular sending of students, such as student exchanges with other universities or language training, partners should be thoroughly vetted and their quality assurance processes examined. For individually organised placements,



departments and faculties should be able to assure themselves that the proposed host fully understands and agrees to their responsibilities.

- 6.11. Departments and faculties are responsible for ensuring that placement opportunities are safe<sup>5</sup> and accessible and that support is in place for disabled students. The experience of students with other protected characteristics must also be considered when establishing placement opportunities given the varying cultural and legal contexts in which host organisations may operate.

### ***Explicit and transparent selection criteria***

- 6.12. If access to an international placement is on a competitive basis then the selection criteria and process of selection to be followed must be fair and transparent.

### ***Robust assessment practices***

- 6.13. It must be clear to students prior to undertaking an international placement how and when they will be assessed, and how that assessment will contribute to their degree.
- 6.14. For arrangements where assessed work undertaken during a placement will count directly towards classification the quality assurance system of the host institution must be reviewed and an academically-justified framework for the transfer of marks must be in place.

### ***Support framework for outgoing students***

- 6.15. Whilst on placements students remain students of the University and their college and as such should still have access to support from their home department or faculty and college. Student wellbeing and progress whilst on exchange should be monitored on a periodic basis.
- 6.16. Students should be provided with information on:
- the role and purpose of the placement within their course (including its assessment);
  - the nature of placement opportunities available, including what is offered by the host organisation and approximate costs;
  - specific provisions they need to make such as personal or health insurance;
  - any notable areas where the host country has significantly different legal provisions, or cultural expectations, as compared to the UK which might affect students during their stay;
  - their responsibilities whilst on placement;
  - who they can contact for help and support before, during and after undertaking a placement;
  - how their progress will be monitored whilst on placement; and

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<sup>5</sup> Taking into account the University policy statements on Safety in Fieldwork, Overseas travel <https://safety.web.ox.ac.uk/travel-and-fieldwork> and Student placements <https://safety.web.ox.ac.uk/student-placements> Fieldwork-related safety training is also available <https://safety.admin.ox.ac.uk/training-a-z>

- what to do if they wish to complain about their placement experience, both during and after the placement.

### **Support framework for incoming exchange students**

6.17. Incoming exchange students should be provided with the same level of support and guidance as Oxford students. Receiving departments and faculties should particularly ensure that arrangements are in place for their induction, accommodation, academic programme, support and guidance.

### **Approval**

6.18. The approval process will vary considerably based on the nature of the proposal, including the complexity of the arrangement and the potential risk to quality and standards.

6.19. **Type 1: Individual arrangements within existing courses** - for some courses with built-in placements, some or all students arrange their placement on an individual basis e.g. British Council traineeships, internships etc. Departments and faculties should have an established process for approving individually arranged placements which meet the general policy requirements of this section. This type also includes research students undertaking a placement at another institution or organisation.

6.20. **Type 2: Adding a new built-in placement** - proposals which introduce a new built-in placement element to a course (e.g. adding a new 'study abroad' year to create a new four year course) constitute a major change to the course design and as such will need to go through the approval process as described in the *Policy and guidance on new courses and major changes to courses*<sup>6</sup>, culminating in approval from Education Committee.

6.21. **Type 3: Adding a new partner to a course with an existing built-in placement** - adding a new partner to an existing built-in placement element (e.g. adding a new university partner to an existing year abroad programme) requires assessing the suitability of the partner and the specific arrangements for students undertaking their placement in that location. Proposals will need to secure approval from Education Committee.<sup>7</sup>

6.22. **Type 4: Adding a new optional placement and/or partner** - an optional placement replaces the normal delivery of the course for the students who choose it (e.g. the final year exchange offered to MEng and MBiochem students). It is therefore necessary to carefully check the quality and standards of the alternative course of study and ensure that they will be able to meet the learning outcomes of their course. Even for courses with optional placements already on offer with other partners, arrangements for

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<sup>6</sup> <https://academic.admin.ox.ac.uk/new-courses>

<sup>7</sup> Student exchange arrangements often have (for operational reasons) exchange agreements with a duration of one year. A lapse of one year would not require re-approval of the arrangement by Education Committee (i.e. agreement in Year 1, no agreement in Year 2, agreement in Year 3). A lapse of two years **does** require re-approval by Education Committee as this is considered to be a new arrangement (i.e. agreement in Year 1, no agreement in Year 2, no agreement in Year 3; re-approval would be required to put in place an agreement for Year 4).

teaching, learning and assessment are likely to be different with each new partner. Proposals will need to secure approval from Education Committee.

### **Written agreements**

- 6.23. All placements must be supported by an appropriate written agreement, normally based on the relevant University template approved by Legal Services. For a one-off arrangement with a host organisation for an individual student, an exchange of letters, outlining the responsibilities of the host, student and University, may well be sufficient as a written agreement. Students arranging their own 'experience' placements should be provided with a standard letter to provide to host organisations. Ongoing arrangements involving several students, or operating over several years should have a more formal agreement put in place.

### **Monitoring and evaluation**

- 6.24. Departments and faculties should review their placement arrangements on an annual basis and report on this to the appropriate department or faculty committee. The review should take into account feedback received from students and host organisations. Departments and faculties should also establish an appropriate schedule of visits to organisations and institutions with whom placements are undertaken on a regular basis.
- 6.25. Departments and faculties which operate a portfolio of international placement arrangements should undertake a strategic review of their portfolio on a periodic basis to ensure that the range of placement offerings available is still able to fulfil the needs of the course or courses to which they relate.

## **7. Integrated professional placements**

- 7.1. Whilst similar in many ways to international placements, placements which form a major integrated element of a course – such as in specific courses in medicine and education - operate within a significantly different context. Students will undertake multiple placements with a range of host organisations. Departments and faculties will have in place comprehensive and sophisticated management frameworks for the operation of those placements.
- 7.2. Departments and faculties responsible for courses which include integrated professional placements are expected to develop their own policies and guidance for staff and students reflecting the provisions of the Quality Code and any requirements of the relevant professional, statutory and regulatory bodies. They are also expected to maintain an appropriate register of arrangements.
- 7.3. Departments or faculties whose courses include small professional placements (whether in the UK or abroad) may not have the extensive arrangements described in the previous paragraph. These placements have more in common with the Type 1 group of international placements (see section 7 above) and should be managed in line with the policy framework set out in the preceding section.

## 8. Signatory authority

- 8.1. The following table outlines the relevant signatory authority for the different types of collaborative agreements.

Authorised signatory	Type of agreement
Student Funding and Study Abroad Manager (on delegated authority from the Registrar)	Student mobility agreements administered by the Student Fees and Funding office
PVC (Education) (on delegated authority from the Registrar)	Bilateral student exchange agreements
	Agreements relating to collaborative taught courses
	Agreements relating to collaborative research programmes (not including those funded through the research councils)
Heads of Unit (within their normal authority)	Minor collaborations
	Placement agreements <sup>8</sup> (excluding exchanges)

- 8.2. Agreements relating to doctoral training programmes funded through the research councils are signed under delegated authority by Research Services, with the PVC (Education) signing for information.

## 9. Register of collaborative agreements

- 9.1. Five categories of collaborative arrangements are defined in section 2. All arrangements falling into categories (a) to (d) are recorded in the University's Register of collaborative agreements, except those in category (e) and those in Type 1 of category (d).
- 9.2. The Register is held and maintained by Education Policy Support. Departments and faculties hold and maintain local registers of collaborations in category (e) and should have records of individually arranged placements (Type 1 of category (d)).

## 10. Monitoring and review of this policy

- 10.1. Education Policy Support and officers from the divisions and the Department for Continuing Education will review this policy on a triennial basis.
- 10.2. This policy is currently under review.

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<sup>8</sup> This refers to 'group' placements agreements, not those arranged individually for a student which would be signed off by an appropriate person in the college or department, but do not normally involving a binding legal agreement.

## **Annex A: Guidance on developing a proposal for a collaborative programme**

A proposal for a collaborative programme should describe the arrangements in place for each of the following elements below. In each case the responsibilities of the University and of the partner organisation should be clearly identified.

- Marketing and recruitment
  - Design and approval of marketing materials
- Admissions
  - Criteria
  - Decision making process
  - Immigration and visa issues (particularly if the course structure necessitates transfer between institutions and/or countries)
- Student status
  - Registration of students for purposes of returns to HESA
  - University Cards and access to facilities and resources
- College affiliation
- Student induction and support for students transferring between institutions
- Student accommodation
- Teaching and examining
  - Capacity of the partner to deliver the programme and process for the approval of partner teaching staff
  - Setting of assessment
  - Appointment of examiners
  - Expectation for feedback to students
  - External examiners
  - For research programmes
    - supervisory arrangements
    - skills training
    - arrangements for transfer and confirmation
    - arrangements for the submission and assessment of the thesis
- Virtual learning environment
- Facilities and physical resources
  - Teaching facilities
  - IT facilities
  - E-learning support
  - Library provision
- Organisational and support structures including reporting lines to relevant bodies
  - Terms of reference and membership of the liaison committee
  - Organisational capacity of the partner to support programme
- Procedures for annual monitoring and review
- Learning resources including access to library provision
- Student support services
  - Careers education, information and guidance
  - Disability support

- Pastoral support
- Student representation and evaluation
- Staff training and evaluation
- Complaints, appeals and disciplinary matters
- Intellectual property
- Health and safety
- Financial arrangements including the collection of tuition fees and payments between parties
- Responsibility for producing certificates and transcripts
- Procedures for monitoring the accuracy of public information and the quality of information for prospective and current students
- Contingency plan for managing student completion in the event that a partner withdraws from the arrangement or cannot fulfil all its obligations

## **Annex B: Guidance on setting up student exchanges**

This guidance is written to cover the setting up of a new optional student exchange placement (Type 4) and establishing an exchange with a new partner as part of a course with 'built in' placement opportunities (Type 3).

### **Key things to consider when considering setting up a new exchange**

It can take up to a year to work through all the stages needed to set up a new exchange before it can be advertised as an option to students. Adding a new partner to an existing exchange programme may take less time, but possible exchanges should not be advertised to current or potential students prematurely.

Exchanges can be time intensive to set up and manage. It is important that there is an academic Exchange Coordinator who has the time to dedicate to the exchange and adequate administrative support available within the department to operate it. It is also important that there is wider departmental support rather than just relying on one enthusiastic individual, in order to ensure the long term viability of the exchange. Support may already be established for courses with 'built in' placement opportunities but a new partner will still add to the overall workload.

When considering developing new optional exchange opportunities it is important to think about:

- What added value will introducing an exchange bring to the course? What is the academic benefit to the students that undertake the exchange? How does it contribute to the learning aims of the programme?
- How would an exchange placement fit into the structure of the programme? What would students miss while they were away and would it restrict their choices later? Would it work best to go for a whole academic year or a shorter period?
- With the exception of exchanges where students complete assessed work on return to Oxford, how would the assessed work undertaken at the partner impact on their overall degree classification?
- How many students would be involved? Is it likely that the exchange can be balanced (equal numbers incoming and outgoing)?

### **Choosing a partner**

The best place to start when seeking to establish a new student exchange are the institutions with which the department has an existing working relationship through research or other forms of collaboration. Partners should be of a similar international standing to Oxford, with a strong reputation for research and teaching, either as an institution as a whole or in the particular subject area in which the exchange is envisaged.

Educational systems differ greatly around the world so it is important to do some initial homework on the context in which the partner operates as well as the specific details of the courses they offer to see if an exchange is possible.

#### **Key questions:**

- What support is in place at the partner for exchanges?

- What is the structure for academic awards in the institution/country? What year/level of study is actually equivalent to the level of study at Oxford?\*
- What is their academic calendar? Semesters or terms? When do they start and finish? When are examinations scheduled?
- What types of teaching and assessment are used?
- How does the curriculum compare? Will students have the necessary pre-requisite knowledge to succeed? Will they still be able to meet the learning outcomes of their Oxford course?
- In what language do they teach? What level of language competence will be required of students?
- What are their expectations regarding student fees? Do they waive fees for incoming students?
- What quality assurance systems are in place? How do they compare with Oxford?:
  - Feedback on assessed work
  - Student feedback and representation
  - Complaints and appeals
  - Course approval and review
  - External quality assurance (external review/accreditation)

\*Note: the exchange does not necessarily need to be a straight swap. For example, some arrangements have fourth year students going out, while incoming students enter the third year, but the impact on this on college teaching would need to be considered (see below).

## Working out the details

Once the basics have been considered and if it is felt to be a worthwhile and viable opportunity the details need to be worked out. This is best done in close collaboration with the proposed partner involving both the academic and administrative leads at both institutions.

The relevant divisional office will be able to offer support in preparing the document and may be able to provide you with examples of previous proposals.

Education Policy Support should be notified at this point that a new exchange relationship is being negotiated ([courseapprovals@admin.ox.ac.uk](mailto:courseapprovals@admin.ox.ac.uk)). EPS will provide advice on what specific quality assurance questions need to be addressed and will want to know the proposed timelines for launching the exchange.

## Drafting a proposal

All elements of the proposal outline below will be relevant for Type 4 proposals (adding a new optional placement element), Type 3 proposals (adding a new partner to an existing 'built in' placement) should focus on sections marked with a '\*' as other sections will relate to established practice and procedures and so may not need to be revisited unless they vary from existing arrangements.

Heading	Suggested content
Strategic rationale	How the proposed placement opportunity fits with the strategic plans of the Department/Faculty, including fit with existing placement arrangements.



Academic rationale	How the proposed placement opportunity contributes to the academic aims of the programme and will benefit students
Partner*	Reasons for choosing that particular partner including: <ul style="list-style-type: none"> <li>Existing relationships</li> <li>International standing of the partner and the standing of the particular department</li> </ul>
Curriculum*	<ul style="list-style-type: none"> <li>Brief description of relevant aspects the partner's country's qualification framework and comparison with the UK to demonstrate equivalence.</li> <li>Course content and structure at the Partner</li> <li>Comparison of course content and structure at Oxford and at the Partner (when replacing part of an Oxford course)</li> <li>Details of language of delivery and language requirements</li> </ul>
Assessment*	<ul style="list-style-type: none"> <li>Methods of assessment (e.g. coursework, exam continuous assessment etc.)</li> <li>Marking process at the Partner</li> <li>System for translation and transfer of marks (when relevant)</li> <li>Weighting of elements for classification (when relevant)</li> <li>Provision of transcript by partner</li> </ul>
Partner processes*	<ul style="list-style-type: none"> <li>Quality assurance (including programme/department review, student feedback, teaching quality)</li> <li>Complaints</li> <li>Appeals</li> <li>Mitigating circumstances</li> <li>Alternative assessment arrangements</li> <li>Conduct (including plagiarism)</li> <li>Health and safety (for placements involving laboratory or field work)</li> <li>Relationship with Oxford processes for complaints and appeals</li> </ul>
Administration*	<ul style="list-style-type: none"> <li>Identify key academic and administrative staff at Oxford and the partner</li> <li>Reciprocal mechanisms for monitoring student progress</li> </ul>
Student support	<ul style="list-style-type: none"> <li>Provided by partner*</li> <li>Provided by Oxford whilst student is on exchange</li> </ul>
Eligibility and selection*	<ul style="list-style-type: none"> <li>Eligibility criteria</li> <li>Preselection process including draft '<i>Information for applicants</i>'</li> <li>Process for selection of outgoing students</li> <li>Process for selection of incoming students by partner</li> </ul>
Preparation for outgoing students*	<ul style="list-style-type: none"> <li>Course choice and approval</li> <li>Logistical arrangements including accommodation</li> <li>Draft '<i>Information for selected students</i>'</li> </ul>
Preparation for incoming students	Arrangements for: <ul style="list-style-type: none"> <li>Which courses and options will be available to incoming students</li> <li>Teaching (including college teaching)</li> <li>Assessment (including communicating with Partner)</li> <li>Student status</li> <li>Student support</li> <li>Accommodation</li> </ul>
Fees and other	Describe:

costs*	<ul style="list-style-type: none"><li>• Student fee arrangements for the exchange</li><li>• Costs of undertaking the exchange (e.g. travel, accommodation, visas, vaccinations, fieldwork, health insurance etc.)</li><li>• Sources of funding available to students</li></ul>
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### **Drafting key student documents**

Alongside the proposal you will need to put together two draft documents providing information to students.

*Information for applicants* (pre selection):

- Reasons for choosing to go on an exchange
- Introduction to the partner
- How they will be taught and assessed at the partner and how it will count towards their Oxford degree
- Details of tuition fees and projected costs
- Basic information on conduct and living in the host country
- How to apply and how selection works.

*Information for selected students* (post selection):

- Key contacts at Oxford and the partner
- Key dates
- Process for selection/finalisation of their academic programme
- Practical information (money, travel, accommodation, health insurance, visas, vaccinations etc.)
- Studying at X (joining information provided by the partner (induction, registration, student support etc.), complaints, assessment, factors affecting performance, alternative examination arrangements, appeals, translation of marks back to Oxford and classification, conduct et.)
- Support and monitoring by Oxford while they are away.

### **Seeking approval**

Initial approval should be sought from the relevant course committee or Departmental Undergraduate Studies Committee (or equivalent) in the first instance. You should liaise with your divisional office about securing divisional approval, and with the Conference of Colleges secretariat to undertake consultation with the relevant Conference committee, prior to submitting your proposal for approval to Education Committee.

### **Negotiating a formal agreement**

All student exchanges must operate under a formal legal agreement. The Legal Services Office are able to provide a template agreement and support negotiations with the Partner's own legal team. This should be done in parallel with working out the details of the exchange placement as it can take some time in itself.

You should also consult with the Head of Insurance Office to check that there are no special provisions required for the country the exchange will take place in, both in terms of general insurance cover and in terms of legal costs in case of arbitration or litigation.

A copy of the signed agreement should be provided to Education Policy Support for inclusion on the Register of collaborative agreements.

## **Implementation**

Once an exchange has been agreed and the legal agreement is in place, the following actions will need to be undertaken over the lifecycle of each exchange year.

- Update course handbook with placement information, finalise *Information for applicants* and *Information for selected students*
- Set deadlines for application and selection/nomination; liaise with partner regarding their selection deadline.
- Advertise the exchange to outgoing students: generate promotional material and schedule a briefing event for interested students
- Undertake selection process and notify:
  - the partner of identity and contact details of nominated students
  - colleges of selected outgoing students so they can prepare for an incoming student
- Partner confirms acceptance of nominated students and Oxford confirm acceptance of nominated students. Final student numbers confirmed.
- Add outgoing students to the University's insurance by contacting the Insurance Office
- Update SITS to reflect study abroad fee liability for outgoing students
- Update SITS to record incoming student status
- Provide joining information to partner/direct to incoming students
- Liaise with colleges regarding accommodation and induction for incoming students
- Arrange department induction for incoming students
- Keep in touch with outgoing students on a regular basis
- Exchange reports on academic progress at agreed points
- Exchange final marks and relevant assessment information
- Convert marks for outgoing students and pass on to Oxford examiners
- Arrange for reorientation upon return of outgoing students.