



*Autumn Academy 2019, Bucharest*

# Joint Programme Management



# Content

- The consortium agreement and related legal matter
- Management structures
- Digitised management
- Joint student administration



## Before starting...

### Consider:

- What elements are specific to JP management?
- Cross-border nature of the cooperation complicates some management aspects
- But not every complexity can be blamed on specific nature of the JP



# The consortium agreement and related legal matters



# The Consortium agreement

- Backbone of the operations of your JP
- Powerful and extensive document
- Might take a long time to develop and require a long formal approval process at your partners
- No agreement is a complete copy of another one



## The Consortium agreement (2)

- Coordinating institution prepares draft (during development phase)
- Early input from all stakeholders needed
- Is best kept flexible through easy amending and use of annexes
- Important: consider duration and include conditions for termination

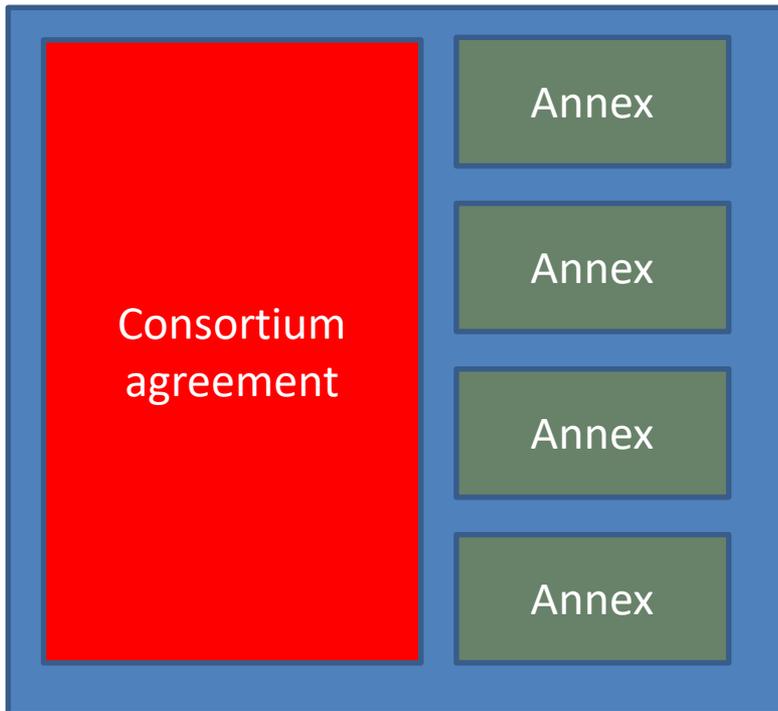


# The consortium agreement's content

1. Purpose and Scope of the Agreement
2. Legal framework and national qualifications
3. Structure and Organization of the Cooperation
4. Programme Structure (learning outcomes, course units, mobility)
5. Student selection, admission, enrolment
6. Examination and transfer of credits
7. Degree awarding and Diploma – template in annex
8. Quality Assurance
9. Financial arrangements and management (including participation costs and tuition fees, annex)
10. Intellectual Property Rights
11. Renewal, Termination and Amendment
12. Application of law and dispute resolution



# Use of annexes



Annexes to the agreement can be used to cover detail, allowing for more flexibility when adapting is needed (if defined in the CA)

Example:

- Programme / Course content
- Detailed admission rules
- Budget table
- Guidelines and handbooks
- Grade conversion tables
- Model of student agreement

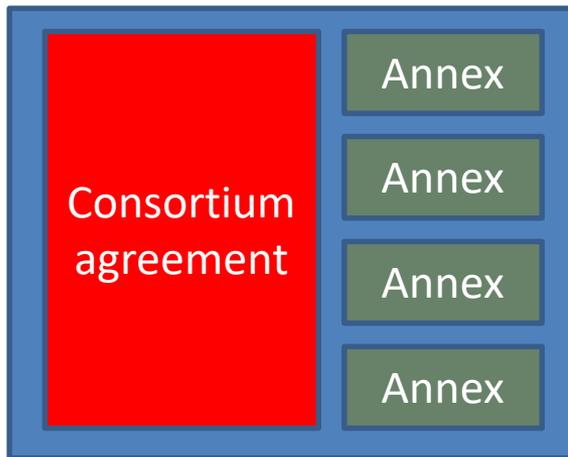


## Adapting the content

- Changes to the programme structure and course content happen
- Take into account formal approval procedures at partner universities
- Plan in advance, at least one year
- Check impact on QA and accreditation



# Other agreements



Student agreement



Thesis Agreement



Associate Partner agreement

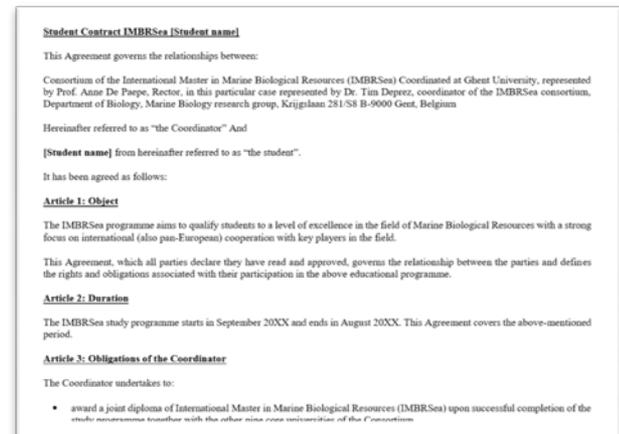


Internship Agreement



# Student agreement

- Agreement between Consortium (coordinating institution) and student
- Consortium rules / obligations / rights
- Content:
  - Programme structure / duration
  - Finances
  - Provide for amendments





# Data protection issues

- Increased awareness and GDPR
- Check regulations at each partner University
  - Eg. Which data needed at which stage
  - Eg. Where is the data stored
- Ask authorization to students
  - At application stage
  - At registration phase



# Data protection issues

## Tips and tricks:

- Include clear regulations on
  - Website / Consortium agreement / Student Agreement
  - Agenda of meetings
- Be careful using social media
- Really do delete data if you say so
- Recording of lectures – be clear to teachers / students



# Management structures



## Management structure

- The Management Board and its committees
- The academic coordinator / promotor
  - Academic head
  - Outward representation
- The (administrative / technical) manager
- The additional support staff at the secretariaty



## No predefined models

- Identify all the players in the programme, identify their role, and accommodate them in the management structure.
- Develop joint management structures for the joint programme's specific needs; avoid creating new committees if local structures suffice.
- Find institutional support by engaging local actors



- The management structure determines how the roles, powers & responsibilities are assigned
- Establish the management structure based on the set of tasks for which joint arrangements are needed



## Joint arrangements are needed for

1. jointly developing and monitoring the academic content of the programme
2. joint student administration
3. joint quality assurance (academic and administrative / internal and external)
4. joint financial administration/decisions
5. joint promotion of the programme & joint student recruitment
6. external representation



## Division of tasks

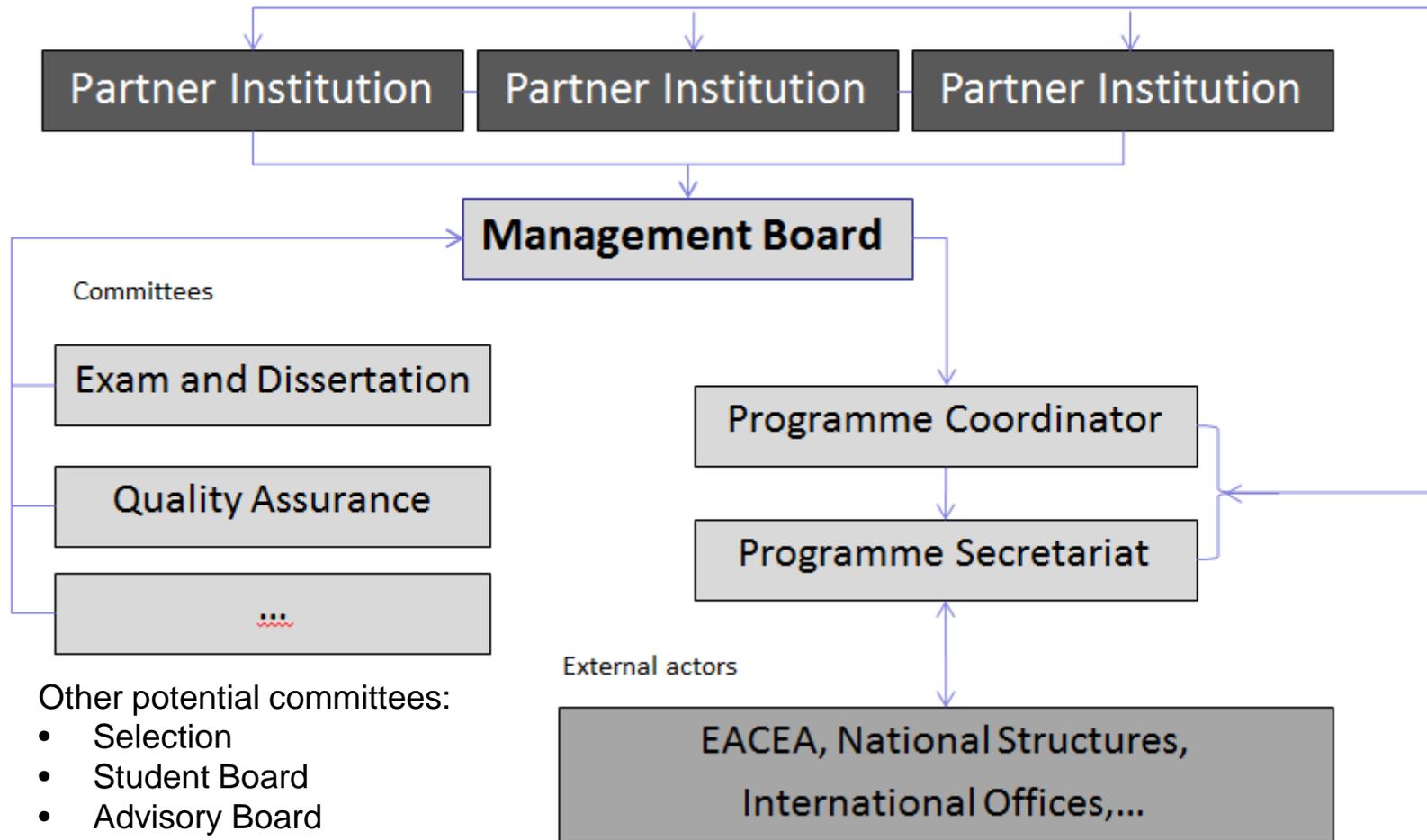
- The coordinating institution is usually in charge of
  - receiving applications,
  - preparing selection,
  - sending acceptance letters,
  - collecting and distributing the participations costs,
  - Monitoring finances
- Partner institutions usually in charge of local enrolment, visas, accommodation, transfer of marks
- Preferably each partner identifies a person to act as a local coordinator & takes responsibility for the JP within the institution



## Partner roles in the management

- Centralised coordination model vs. decentralised
- ‘Secretariat does all’ or shared responsibility and ownership, next to teaching, thesis, internship
- Eg. share roles on QA, promotion, advisory board, data management, developing specific elements (eg. Online, summer school, etc.)





# The Management Board

- Decision making body at programme level
- Contains representatives of all full partners
- Example composition:
  - 1 representative per main partner
  - 3 student representatives
  - 1 representative from coordination office
  - 2 associate member representatives
  - External ad-hoc advisors / experts
- Meetings in variable ways
  - Physical (2 per year)
  - videoconferences
  - Via email consultation
- Decides by vote on academic content, selection of candidates, degree awarding, budget
- Assisted by sub-committees



## The coordinator(s)

- The coordinating academic
  - Presides the management Board
  - Steers the consortium secretariat
  - Guarantees the smooth operating of the consortium in general
  
- The technical coordinator / administrator
  - Day to day operating
  - Communication hub
    - Partners
    - Website
    - Applicants and students



# Centralised secretariat

## In a centralised model, the secretariat may have as tasks:

- Communication with consortium partners
- Organisation of consortium meetings
  
- Promotion and communication towards prospective students
- Screening of candidate-students, preparing the selection
- Follow-up of students and scholars within the consortium
- Visa-support to individual students (IRO: general procedures)
  
- Internal cooperation within Faculty administration
- Cooperation with central Student Office concerning student files and degrees
- Communication with Housing Department
- ...



# Local Administrative Entities

- Programme secretariat (1 FTE+) for consortium management
- Faculty: formal approval of the programme
  - Faculty Board
  - Dean's administration (student administration, quality assurance unit)
- Central International Relations Office for monitoring and assistance
- Central unit for study programmes and student administration
- Board of Governors: formal approval of the programme
- Financial Department
- Central Student Services:
  - Housing Department
  - University Language Centre
  - e.a.



# The ideal joint programme manager?

- Knows his/her own institution very well
- Knows his/her partner institutions well
- Is in very close cooperation with academic leadership of the programme
- Is an external, as well as an internal networker
- Understands the needs of mobile students and is interculturally aware
- Understands the administrative needs for running a programme
- Is creative in finding original solutions to complex situations, without breaking rules
- Knows how to use IT communication tools
- Can plan well, but also makes good use of the less busy periods to facilitate future operations
- Is motivated by the outcomes of the joint programme: happy students



# Digitised administration



# Digital management

## What can be done digitally?

- Application procedures
- Communication with partners and students
- Daily management
  - Letters and certificates
  - Mobility procedures
  - Interaction with external organisations – Bank / Insurances / etc.
- Thesis evaluation
- Follow-up of procedures (timeline)
- Partner management (key data)



## Digital management tools

- Dedicated online platform for joint programme administration (eg. Econsort)
- Usual suspects: E-mail, Sharepoint, Slack, etc.
- Important:
  - Analyse your consortium level administrative procedures
  - Choose the right tools on the basis of your analysis
  - Not every programme manager has excellent IT skills: make it simple and provide documentation



# Joint Student Administration



## Joint Admission requirements

- Joint admission requirements must be in line with national and institutional regulations
- Joint online application and joint selection
  - all partners access to application form
  - involve local admissions office of the coordinator
- Agree how to manage possible complaints
- Enrolment / Registration (check institutional guidelines, normally at HEIs awarding the degree)



# Application, selection and admission

- Applications are processed online
- This usually requires a customised online application form
- Two-step procedure:
  - Step 1: Eligibility
  - Step 2: selection on basis of set criteria
- One partner oversees the procedure and assists students with their questions
- Partner universities have access to applicant data
- A joint committee makes the final selection



# Student application - Cases

- Applicant-oriented
  - Preferably multi session online form
  - Provide FAQ, video tutorials or webinar
- Collect relevant data providing you with reliable info
  - Personal data
  - Student track-record
  - Motivation
- Options
  - Descriptive motivation vs. motivation questionnaire
  - Written project proposal (thesis in mind)
  - Short intro video
  - Recommendation letters
  - Skype interviews, tests etc.



## Joint student administration

- Information for students must be harmonised across all partners
- Monitoring progress: agree who is responsible
- Transfer of credits, archiving of student records
- Practical issues like insurance, visa, residence permits, accommodation (usually offered as part of the general student services at each partner institution).
- Assessment and grading: shared policy



- Students are enrolled at the coordinating institution and registered at the others (variations exist)
- The coordinating institution carries all information on both the entire programmes as well as all students
- The mobility in JP context can be administered in a separate way from exchange mobility flows
  - In fully integrated JPs, learning agreements aren't really needed anymore
- Local Exam regulations apply – exceptions for JPs allowed
- Local marks are transferred to the coordinator



## Mobility Guidance

- Central coordinator, local administrators and IROs need to be well-tuned
- Provide as much information as possible on your programme website
- Many programmes develop a specific student handbook
- Beware of the ‘procedural trap’: “which type of students are they?”



## Grade conversion

- ECTS Grading Table implementation

Vs

- Alternative approach with direct conversion
  - Conversion table as part of annex to consortium agreement
  - Sensitive issue towards students



## Degree Awarding

- The joint degree is prepared by the coordinating institution, upon the joint decision by the programme board
- If double degrees are awarded, it is good practice that they refer to the joint programme context in which they are awarded
- A joint diploma supplement is prepared by the coordinator, containing all activities of the student across the consortium



# Sustainability, promotion and Quality Assurance



The ability to be maintained at a certain rate or level

## Feasibility?

- Skill to do something
- Resources to do something
- Skills and resources can be acquired  
> (there is hope!)



The ability to be maintained at a certain rate or level

## Maintain?

- Projection
- Future
- Rational effort



The ability to be maintained at a certain rate or level

## Rate?

- Numbers (of students)
- Cost/income balance



The ability to be maintained at a certain rate or level

## Level?

- Quality level
- Satisfaction level



The ability to be maintained at a certain rate or level

## To summarize:

- Skills and resources
- Future, projection, rationale
- Figures, costs/income
- Quality level, Satisfaction level



# Financial sustainability

- A joint programme takes great effort to set up
- These efforts cost resources
  - Time of the academic and administrative staff involved
  - Travel costs
- Regardless of the costs model of your university, you will want to see a 'return on investment':
  - Either expressed in direct financial terms (tuition fee revenue generation)
  - Or expressed in terms of student numbers, student and staff satisfaction, numbers of alumni employed, outcomes in research collaboration between the partners, etc.
- In most basic terms: you don't want to discover after the development phase or an initial implementation phase, that the JP can simply not be maintained at a level worthwhile or organised at all, due to a lack of resources



## Drafting the budget

- Drafting a budget is part of the development
- The financial arrangements are part of (an annex of) the consortium agreement
- Financial structures differ across partner universities (Full cost model vs. incremental costs)



## Participation costs

- Both financial needs and strategic considerations (marketing)
- Distinguish the local tuition fees from the overall programme participation costs (if any)
- Find a mechanism for distributing the (surplus) income (eg Credit based, course-based, semester-based)



## Consortium income

- Participation costs / tuition fees
- University / Government support
- Scholarship schemes
- Project funding
- Sponsoring



## Consortium spending

- Local tuition fees
- Student services and organisations
- Programme management
  - Secretariat (website, tools)
  - Meetings
  - Promotion
- Staff costs
- Marketing and recruitment
- Branding
- Sustainability / reserves



Possibilities of charging fees, as proposed by the JOI.CON master team *JEMToM*

Possible Solution	PRO	CON
1) Single consortium fee	<ul style="list-style-type: none"> <li>• consortium remains cohesive</li> <li>• students are treated equally</li> <li>• reserves for sustainability can be collected</li> <li>• collecting fees is an uncomplicated process</li> <li>• JP marketing is transparent</li> </ul>	<ul style="list-style-type: none"> <li>• legal framework of partners might pose obstacles</li> <li>• currency exchange complicates transfers</li> <li>• less attractive for students from countries with lower or no tuition fees</li> <li>• programme might profit inappropriately from fees</li> </ul>



2) Fees charged according to study location

- no currency exchange involved
- reliable (consistent) funds for institution that really hosts the students
- fees are a matter of students' choice

- additional managing costs arise
- students do not pay equal amounts
- funds are not consistent, additional service fee for consortium might be needed
- not all scholarship schemes are eligible

3) Fees charged according to home institution

- students benefit from expensive universities at low cost
- no currency exchange involved
- scholarship schemes are eligible

- risk of uneven student flow
- students might pay high fees while studying at low-fee institutions
- funds are not consistent, additional service fee for consortium might be needed



## Overcoming differences?

- Waivers of local tuition fees
- Limits to student numbers
- Equal lump sums per student
- ...



# Sustainability

- Setting up a new course programme: semi-permanent nature
- Many related aspects (promotion, quality, organisation,...) all aiming for:
  - maintaining enrolment figures
  - being cost effective
- Mostly, but not only a financial matter:
  - Quality: Programme accreditation / Degree recognition
  - Staff in consortium network: leaves, pensions, etc.
  - embedding in local academic and administrative structures



## Not only a financial issue

### **Sustainability also entails:**

- Quality: Programme accreditation / Degree recognition
- Staff continuity: leaves, pensions, etc.
- Embedding in local academic and administrative structures



# Options

- Creation of a reserve fund through budget surplus
- A budget surplus might also allow for (partial) fee waivers
- Complementary funding
  - Extra scholarships (very specific to subject area)
  - Joint investment from the partner universities
  - Extra funding for management
  - Cost-effective organisation (share administrative tasks?)



# Budgeting

- The more integrated the JP, the more involved the cost model
- The model is dependent on the budget model of the individual partners
  - Is a full-cost model to be developed for the JP? Is also teaching staff to be covered by JP-level income from tuition fees?
  - Or 'merely' overhead costs related to joint elements to be covered?
- Usually, the JP-level budgeting focusses on the JP-level overhead costs
- Options: outsource different tasks to the partners, or centralise at one coordinating institution
- To what extent does the consortium/programme need to cater for the joint activities with JP-level income, and to what extent can it rely on services of the individual partner universities?



## In concreto

- Draft a budget table with costs and projected incomes, making a prognosis for eg. 10 years
- Run different scenario's
  - Minimum scenario with minimum number of students to be enrolled, in order to organise the programme
  - Average scenario with realistically expected success
  - Optimistic scenario: additional income may allow for additional joint activities
- Base the student number prognosis on a needs analysis / student survey



# Costs and income

- What are typical JP-related overhead costs?
  - Partnership level management of the programme
  - The more integrated the programme, the more joint activities, the higher this management cost will be
  - Typical
    - Website
    - Promotion, recruitment
    - Preparation of student selection
    - Travel costs for meetings of key staff
    - Administrative liaison
    - Provisions for sustainability (eg. a fund)
- Income-side (strongly dependent on internal structures):
  - (part of) the tuition fees, dependent on the number of students
  - Support from other institutional levels (Faculty, Institution)
  - External funding (eg. EU-contract, sponsoring, etc.)



## Division of income

- Is there direct income at JP level to be divided over the partners?
  - This is dependent on the level of (administrative) integration (centralised budget, vs. 'each caters for their share')
- One possible model: after commitment of the JP-level budget, divide the income equally per partner per student per semester
- But different partners may have different financial needs:
  - what is needed at local level in order to guarantee the offering of their part in the programme? Is the programme sustainable overall, but also at each of the partners?



## External funding

### **Is external funding (eg. EU-calls) beneficiary to the sustainability?**

- Chicken or the egg?
- Is the fact that there is such an opportunity the main driver for the development of the JP, or was the idea for the JP first?
- How to adapt the original idea for the JP to the needs of the external funding programme?
- Avoid dependency on external funding if sustainability of the JP is aimed



# Marketing and Branding



## Focal points

- Explain the particularities of a joint programme well, as well as its benefits
- Ensure that information is coherent across the consortium
- Be aware of risk of marginalisation in partner university mainstream communication / marketing channels
- Take on a bigger role at programme level than usual



## Promotion methods

- The main instrument: programme website
- Flyers, posters, promotional websites, recruitment fairs, social media
- Shared responsibility among all partners
- Use the wider international stakeholder network
- Large impact of the academics



## Create a brand

“I was a student of the Joint Programme in ...”

**VS**

“I was an exchange student in UniA and UniB”

### **Give visibility to jointness through JP Identity:**

- Students
- Teachers
- Employers
- Alumni
- Universities
- ...



## Create a brand (2)

- Organise Joint events
  - Intro weeks
  - Summer School / Winter School
  - Graduation symposia
- Create attractive joint service platforms
  - Programme mailboxes
  - Teacher interaction fora
  - Video channels
  - Course repositories
- Support student initiatives
- Create branding materials (T-shirts, bags, mugs, etc.)



**Thank you!!**

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