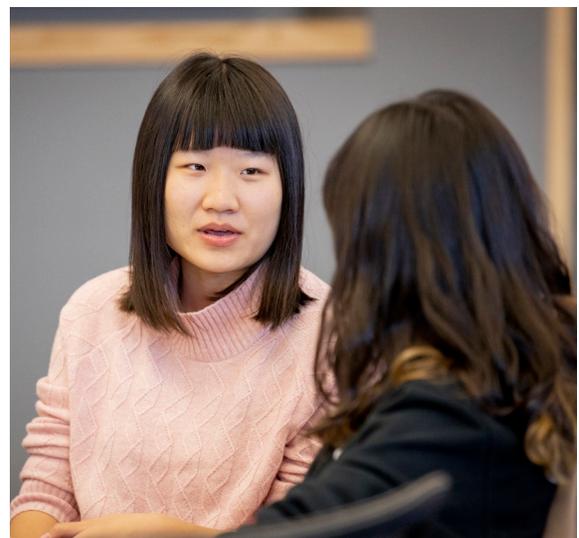


Virtual Exchange Guide

FOR SENIOR INTERNATIONAL OFFICERS

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The Stevens Initiative is an international effort to build global competence and career readiness skills for young people in the United States and the Middle East and North Africa by growing and enhancing the field of virtual exchange. Created in 2015 as a lasting tribute to Ambassador J. Christopher Stevens, the Initiative is committed to helping to expand the virtual exchange field through three pillars of work: investing in promising programs, sharing knowledge and resources, and advocating for virtual exchange adoption. The Stevens Initiative has awarded 60 grants and, by summer 2022, will expand its reach to over 43,000 young people in 16 MENA countries and the Palestinian Territories, and in 45 U.S. states, Puerto Rico, three tribal communities, the U.S. Virgin Islands, and Washington, D.C. Learn more: <https://www.stevensinitiative.org/>

The Aspen Institute is a global nonprofit organization committed to realizing a free, just, and equitable society. Founded in 1949, the Institute drives change through dialogue, leadership, and action to help solve the most important challenges facing the United States and the world. Headquartered in Washington, DC, the Institute has a campus in Aspen, Colorado, and an international network of partners. Learn more: <https://www.aspeninstitute.org/>

Goal

To guide Senior International Officers (SIOs) at postsecondary institutions in establishing virtual exchange as a critical part of inclusive internationalization.

Defining Virtual Exchange

Virtual exchange uses technology to connect people for education and exchange. Virtual exchange programs typically serve young people. Many virtual exchange programs are international, connecting participants in different countries to help them gain global competencies, among other knowledge, skills, and abilities. Many practitioners believe that facilitation by prepared, responsible adults — often but not always educators — is an important component of successful virtual exchange.

Why Virtual Exchange?

Young people need the right mindset and skills to navigate the world’s challenges, but they often lack opportunities for global learning, especially at a time when student mobility is limited and finances are constrained. Virtual exchange can help young people develop communication and collaboration skills and a more globally-informed perspective. Virtual exchange can broaden access to international learning for every student, regardless of their circumstances, background, or ability. Virtual exchange is not just a short-term solution to the disruption campuses face today but is also part of a comprehensive plan to advance internationalization at home for each institution and each student.



Steps to Starting a Successful Virtual Exchange



1. Institutional Scan

Scan the landscape for virtual exchange at your institution.

a) **Internationalization Goals:** Determine your campus internationalization goals and map out how virtual exchange can contribute to achieving them, such as by creating conditions for a wider group of students to experience global learning, gain global perspective, or take a course that has a global learning component.

It is important that you gain alignment amongst your leadership on how virtual exchange is a part of your internationalization strategy or plan. Misalignment between leadership could cripple these efforts. Clarify the relationship between virtual exchange and traditional mobility/study abroad – this should not be seen as a “zero sum.” Virtual exchange and mobility as well as other interventions to internationalize the campus can complement one another and provide a more rich and seamless experience for students.

If your institution hasn’t established internationalization as a goal, consider advocating for the adoption of a comprehensive internationalization framework and the formation of an internationalization council if there aren’t clear commitments and systems in place. **See the internationalization framework, with six key targets, developed by the [American Council on Education](#).**

- b) **Assess the Disruption:** Gain an understanding of how the pandemic or other event has impacted your international activities (students not on campus, visiting fellows not present, inbound and outbound study abroad opportunities postponed, etc.) and evaluate whether a virtual exchange can be of value where disruption has occurred.
- c) **Identify On-Campus Champions:** There are likely people on campus – particularly faculty, but also potentially graduate instructors, instructional technology, research project leaders, international engagement staff, etc. – who already conduct virtual exchange or something like it (telecollaboration and globally networked learning are sometimes used to refer to similar practices). They can help demonstrate and mentor others who want to get involved. Build on those successes. Solicit their feedback and expertise. They may have already connected with the different assets on your campus and understand some of the opportunities and challenges.
- d) **Asset Mapping:** What institutional assets are available to support the development and scaling of virtual exchange programs? Consider how supporting virtual exchange might meet some of the needs and be mutually beneficial to colleagues in these areas, as well.
- i) **Curricular Approval:** Who approves changes in course curricula and delivery (e.g. the provost’s office or a faculty governance committee)? What approvals, if any, are needed to hold a virtual exchange program in a course or as an extracurricular experience? Consider, too, that virtual exchange can often be added to an existing course without requiring curriculum committee approval.
- ii) **International Partnerships:** These can be a valuable resource to help connect with partner institutions and the faculty there. Having a committed virtual exchange partner is one of the most important aspects of conducting a successful virtual exchange. See the partnerships section below for more information on partnerships.

- iii) Curricular Design and Online Learning Unit: Your institution may already have invested in administrative units to deliver online learning and help with new learning models, particularly in response to the need to build capacity for online instruction during the pandemic. Don't assume that adding Zoom and an international partner are all that is necessary for a successful virtual exchange; a curricular design team may be helpful with the virtual exchange integration. Later in this guide, resources are shared for effective course and program implementation.
 - iv) Global Learning and Education Abroad Offices: These offices can be invaluable allies in providing global learning expertise, in reaching students, faculty, and staff, and in potentially being a bridge to new virtual exchange implementation partners.
 - v) Office of Diversity, Equity, and Inclusion (DEI): Your DEI office can be a helpful resource in ensuring your virtual exchange program curriculum incorporates principles of equity and cultural sensitivity and maintains a balance in power dynamics. Your DEI team can also guide you to make sure your program is accessible and inviting to all students.
 - vi) Information Technology: Consider who oversees the campus technology infrastructure – bandwidth, hardware (such as webcams, screens, and computers), smart classrooms, and other technology platforms (such as Zoom, Skype, Google suite, etc.). They can also be a great asset to address security concerns.
- e) Gaps in Resources: Understand what resource or asset gaps might hinder virtual exchange implementation at your institution. Perhaps your institution does not have a curricular design unit or a faculty training center. Consider solutions or workarounds that you or your colleagues can put in place to support practitioners. Don't forget that your potential partner institutions may have capabilities to complement yours.
 - f) Incentives and Barriers: Consider which units on campus might be concerned about a possible negative impact from increased virtual exchange. How can you reassure your colleagues that virtual exchange is not a threat but rather a complement to, or even a way to raise interest in, other forms of international exchange? Consider structuring a virtual exchange in a manner that is additive to complement existing internationalization efforts.



2. Establishing Institutional Buy-In

Virtual exchange is ultimately about a partnership between two or more classrooms/institutions, but also about units on campus working in concert to make sure the virtual exchange program provides a seamless and successful experience for students. Nurturing the buy-in of necessary campus stakeholders is an important aspect of any virtual exchange. ***Which of the units in the previous section will be critical partners and allies in helping a virtual exchange program be successful faculty campus?***

- a) Mobilize Faculty Champions: You've already identified faculty champions of virtual exchange. Reach out to them and invite them to play a significant role in presenting virtual exchange to their colleagues and in mentoring new practitioners.
- b) Start Small and Build: Consider focusing early efforts on one division or department that is well-suited to piloting virtual exchange, such as faculty who have conducted some virtual exchange or who are enthusiastic

to get involved; fields that involve subjects with compelling international themes and linkages. Then, expand as you are able to share data and faculty and student testimonies that demonstrate the value of the experience.

- c) **Research:** Share research demonstrating the positive results of virtual exchange, particularly how virtual exchange helps prepare students for jobs that require global competence. The Stevens Initiative shared an [annotated bibliography](#) of some recent publications. Scholars and practitioners continue to publish articles and other resources that illustrate the case for virtual exchange.
- d) **Access:** Students who wish to study abroad and gain global competencies often encounter barriers (financial, curricular, global events, etc.). Note the impact of virtual exchange on student success and how virtual exchange can help students acquire global competencies.
- e) **Articulate the Commitment:** Develop an institutional statement in support of virtual exchange. This would make it clear to people across campus that virtual exchange is a priority within your institution's internationalization strategy.
- f) **Provide Resources:** Micro-grants or funding for trainings can be a powerful way to reward and incentivize faculty members and academic units to integrate virtual exchanges into their courses and programs and to show ongoing support for faculty while they are teaching.
- g) **Coordination:** Name someone to promote and coordinate virtual exchange efforts, even if it is a small part of their job. They can lead a "community of practice," where support and mentorship can be an offering to guide faculty.



3. Choosing the Best Model for Your Campus

Once you've decided you want virtual exchange on your campus, you can design your own program with a partner, have a third party help provide the service for your team, or a combination of both.

- a) Designing your own virtual exchange program allows you to customize the virtual exchange experience to your liking but may require more effort.
- b) A third-party provider can give your students the opportunity to connect in a pre-existing program that may fit with many, but not all, courses. The third party will generally have their own platform, coordinate curriculum and sessions, and be responsible for finding partners. This outsourced model is often an easier pathway to implementation but there may be fees associated with this approach. In some cases, the Stevens Initiative may be able to support your participation in a limited number of programs.

For more information, fill out our [Join a Program form](#).



4. Designing Your Own Program

If you choose to design your virtual exchange program(s) with partners: Your virtual exchange partner(s) are a critical piece of your program.

- a) Finding a Partner: Partners can be found through your institutional partnerships, through faculty or staff connections, or through associations and professional networks. Partners could be individual, departmental, or institutional. A partner should have a similar vision for the virtual exchange program.
- b) Designing: When designing a virtual exchange program, your respective teams will work together on issues such as co-designing the course interactions, selecting a technology platform(s), and scheduling sessions based on mutually agreed upon terms. [See the Forum on Education Abroad Guide to Online Learning and COIL Course Development Manual for more details.](#)
- c) Mutuality: Work together with your partner institution so your program serves both sets of students in a balanced manner. Collaboration should benefit both sides, though the benefits can be different (for example, one classroom may be seeking Spanish language practice, while another wants to engage in project-based learning).



5. Motivating and Supporting Faculty Participation

As the SIO, there are numerous ways for you to keep faculty motivated and engaged in facilitating virtual exchange programs.

- a) Share Information: Present information on virtual exchange at faculty meetings or to the faculty interest group on internationalization (if such a group exists). Create an informational flyer to highlight for interested faculty how they could use virtual exchange to expand their international work or create a global dimension to their efforts.
- b) Recruit Creatively: Recruit among faculty who have led short-term study abroad programs (who might have connections to potential partners) and have an interest in conducting virtual exchanges.

Case 1

The William Davidson Institute at the University of Michigan has connected its business school with the **American University of Beirut, American University of Cairo,** and an NGO in Libya to conduct a virtual exchange-enhanced course for undergraduates titled “Business and Culture.”

To learn more about the program, [click here](#).

Case 2

Soliya is an NGO offering an immersive, dialogue-based virtual exchange. Their Connect program offers virtual exchange programming that integrates with existing coursework in coordination with faculty. Students engage in synchronous virtual exchange sessions once a week outside of course time for two hours to discuss international relations and then continue the discussion in their respective classrooms.

To learn more about Soliya’s Connect program, [click here](#) and watch this video.

- c) **Highlight Successes:** Share the successes of the champions on your campus to attract more faculty to the endeavor and build momentum. This can be done by recognizing all-star practitioners by giving them awards; naming them as virtual exchange ambassadors; inviting them to hold brown bag lunch presentations; or showcasing them in a newsletter, website, social media feature, or publication.
- d) **Provide Training:** Those seeking to design and conduct virtual exchange may be looking for professional development opportunities. Offer to provide these training opportunities. Cap training enrollment at reasonable numbers to ensure each faculty member gets adequate attention and support. Try to incorporate international partner faculty in the trainings to simultaneously build their knowledge and ensure they work in partnership with your institution's faculty. Trainings can include sections on program/course design, coordination, selecting and managing the technology, facilitating the virtual exchange, and evaluating the impact of the program on students. Additionally, many conferences and other institutions offer trainings available to faculty.
- e) **Support with Additional Resources:** Provide resources for training and implementation, such as stipends or small grants for course development, for faculty members who commit to run the virtual exchange multiple times.
- f) **Provide Travel Opportunities:** This could include a stipend for travel to meet in person with the faculty member's international partner and their partner's students, either before, during, or after the virtual exchange (if conditions allow travel).
- g) **Evaluate the Impact:** Work with faculty and staff to incorporate evaluation into all virtual exchange programs and courses. Draw on existing tools and methods such as surveys and scales developed by the Stevens Initiative or others to demonstrate impact. Get student feedback. Make adjustments, and refine the program. This can be done by the faculty member or administrative team facilitating the virtual exchange. It can also be done in conjunction with another administrative unit on campus responsible for evaluation. **The Stevens Initiative has made its [Evaluating Virtual Exchange toolkit and appendix of survey questions available to all practitioners in addition to the \[Protocols for Collecting Qualitative Data About Virtual Exchange Programs\]\(#\). Feel free to modify the survey questions to suit your needs.](#)**
- h) **Support Faculty Professional Development:** Support opportunities for faculty to attend and present at conferences to both learn from others and gain recognition by sharing their work.
- i) **Provide Course Load Relief:** Reduce the course load or enrollment expectations for faculty who are participating in training or conducting virtual exchange.
- j) **Refine Hiring and Promotion Criteria:** Add virtual exchange to the criteria for evaluating or hiring faculty, including considerations for tenure and continuing appointment, so their effort and achievement are recognized. Acknowledge that even if the collaboration is not a resounding success, the faculty effort and contribution to internationalization goals merit recognition.

Case 3

Many institutions offer stipends or micro-grants as incentives for faculty members to develop virtual exchange courses. Stipends often range between \$1,500 to \$3,500 and can cover travel expenses or start-up costs for both collaborating faculty to build the partnership.



6. Finding Synergy Between Campus Units

As the SIO, you can help make important connections to other campus units.

- a) Enrollment Management: Virtual exchange can be a powerful way for international students to learn about your institution. This can serve as an introduction point for your institution to recruit international students for subsequent academic program enrollment. How can virtual exchange be part of your strategy to engage future applicants and to keep U.S. and international students engaged?
- b) Study Abroad: Virtual exchange and study abroad are different educational interventions – virtual exchange is not “study abroad light” – it is a different experience. With that said, a virtual exchange program and study abroad program can complement one another to build a stronger pathway to study abroad and continue the engagement after the experience abroad. Given the disruption caused by the pandemic, many campuses are quickly moving to virtual exchange programs to keep global learning going for students who may not be able to experience a study abroad at this time.
- c) Communications and Development: You should communicate about your virtual exchange to both internal and external audiences. The development team may be able to cultivate philanthropic support from alumni and donors to advance your endeavor. If you include virtual exchange and campus internationalization as a priority in your next capital campaign, your development team should be involved.

Case 4

Data from the past several years of virtual exchange at **East Carolina University** suggest students – and particularly students of color – who participate in virtual exchange are more likely to subsequently study abroad later in their college careers. Jami Leibowitz, ECU’s Associate Director Global Affairs and Director Global Academic Initiatives, points to this preliminary information to bolster the case for virtual exchange as a complement to other internationalization efforts with leaders across campus.





7. Accounting for the Cost of Virtual Exchange

While virtual exchange can be a cost-effective tool to internationalize your institution, it still requires an investment based on your aspirations and program design.

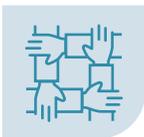
- a) **Cost Per Participant:** Like other education and exchange methods, virtual exchange has a cost, but the cost per student can be relatively lower than the cost for many traditional, in-person programs. Programs operating at a small scale may be able to get by with very little spending at the start. For example, faculty may be willing to invest their time in designing the program, their salaries may already be covered, and the program might use existing technology platforms and devices. As virtual exchange programs seek to grow or sustain over time, a larger portion of the cost – for faculty stipends, administrative time, training, technology, evaluation, other expenses, and possibly even covering some of these costs at partnering campuses – may need to be explicitly covered to carry out the program. Larger and more efficient programs may begin to benefit from economies of scale. The full cost of a virtual exchange program is typically a few hundred to several hundred dollars per student, depending on program specifics.
- b) **Creative Funding Sources:** The pandemic underscores the need to recognize, and find ways to cover the cost of, virtual exchange programs. It is increasingly important to find ways to fund these programs without relying on discretionary funds or revenue from student mobility, both of which are often in short supply. Those in the virtual exchange field continue to discuss how to establish sustainable models for funding virtual exchange programs so they can self-support through tuition, fees, or other arrangements, such as direct philanthropic support.



8. Sustaining and Growing Virtual Exchange

If you're just starting your virtual exchange program, you may not be thinking about sustaining a program and growing it over time, but it's never too early to begin thinking about the future. There are various approaches to do so.

- a) Make virtual exchange a permanent part of your campus internationalization efforts.
- b) Identify financial support structures that can help a program continue over time, such as revenue from tuition and fees, or philanthropic endowments to help institutionalize your courses or program. Consider including virtual exchange as a priority in your next capital campaign.
- c) Stay in contact with faculty who conduct virtual exchange. Hold quarterly lunches (online or in-person). Encourage and incentivize faculty members to repeat the exchange or incorporate virtual exchange into another course.
- d) Empower faculty to be champions and advocates, especially as they seek to publish and present promising data and observations from their virtual exchange experiences.
- e) Incorporate virtual exchange into a system of digital badging or micro-credentialing to document student work and help them demonstrate the value of their virtual exchange experience as an asset for the 21st century job market.



9. Equity

Real-world inequities can often manifest themselves in a virtual exchange program. Successful programs will be intentional in how they navigate issues that may contribute to inequities and imbalances between participants.

- a) Involve faculty from all participating countries and institutions from the beginning of the program design and facilitator training process. Investing in genuine collaboration is not only more equitable, it also contributes to deeper, more sustainable partnerships.
- b) Provide equal incentives to faculty from all participating institutions with regard to funding or other resources for setting up or conducting a virtual exchange.
- c) Translate all communications and materials when a virtual exchange connects faculty and students who speak different languages.
- d) Recognize the involved individuals and institutions in all participating countries in publications or presentations about the virtual exchange.
- e) Let faculty know what to expect about the additional work involved in setting up and conducting a virtual exchange. Explain that the initial investment can prove to be worthwhile as they gain technology and collaboration skills and have rewarding teaching experiences.



10. Resources

The Stevens Initiative develops and curates resources to support the implementation of virtual exchange globally.

- a) Stevens Initiative [Resource Page](#)
- b) SUNY Collaborative Online International Learning (COIL) Center and [course design guide](#)
- c) Stevens Initiative [Ways to Engage](#)
- d) The Forum on Education Abroad's [Online Global Learning Experiences Guide](#)
- e) Stevens Initiative [Evaluating Virtual Exchange toolkit](#), [Appendix of survey questions](#) and [Protocols for Collecting Qualitative Data About Virtual Exchange Programs](#)
- f) Stevens Initiative [Annotated Bibliography on Virtual Exchange Research](#)
- g) American Council on Education's [Comprehensive Internationalization Framework](#)
- h) Webinar on [Virtual Exchange and Campus Internationalization](#)

Virtual Exchange Guide for Senior International Officers

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