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Association of International  
Education Administrators

# 2020 ANNUAL CONFERENCE

*Rethinking Comprehensive  
Internationalization for a  
Global Generation*

# Establishing Offshore Operations Challenges, Opportunities and Successes

Kim Morrison, Grok Global Services

Dr Matthew Pucciarelli, St. John's University

Brett Berquist, University of Auckland

Tori Ellenberger, Deakin University

Dr Jeffrey Riedinger, University of Washington

# **Demands and Trends**

**Kim Morrison**

**CEO, Grok Global Services**



# Demand for Global Management Framework

- Demand drivers for in-country presence
- Non-US universities
- American universities





# Major Trends in Deployment of In-Country Staff

- Improvements on campus
- Better team management
- A professional work environment
- New strategies impacting staffing
- Administrative / commercial arrangements



# Challenges for SIOs

- Conditions for success on campus
- Conditions for success off campus
- How to deploy staff?



# Management Across Borders

Dr Matthew Pucciarelli,  
*Associate Provost of Global Programs*

St. John's University  
Queens, New York





# St. John's Sites Abroad

New York City "Home Base"

Paris, France Site

Rome, Italy Campus



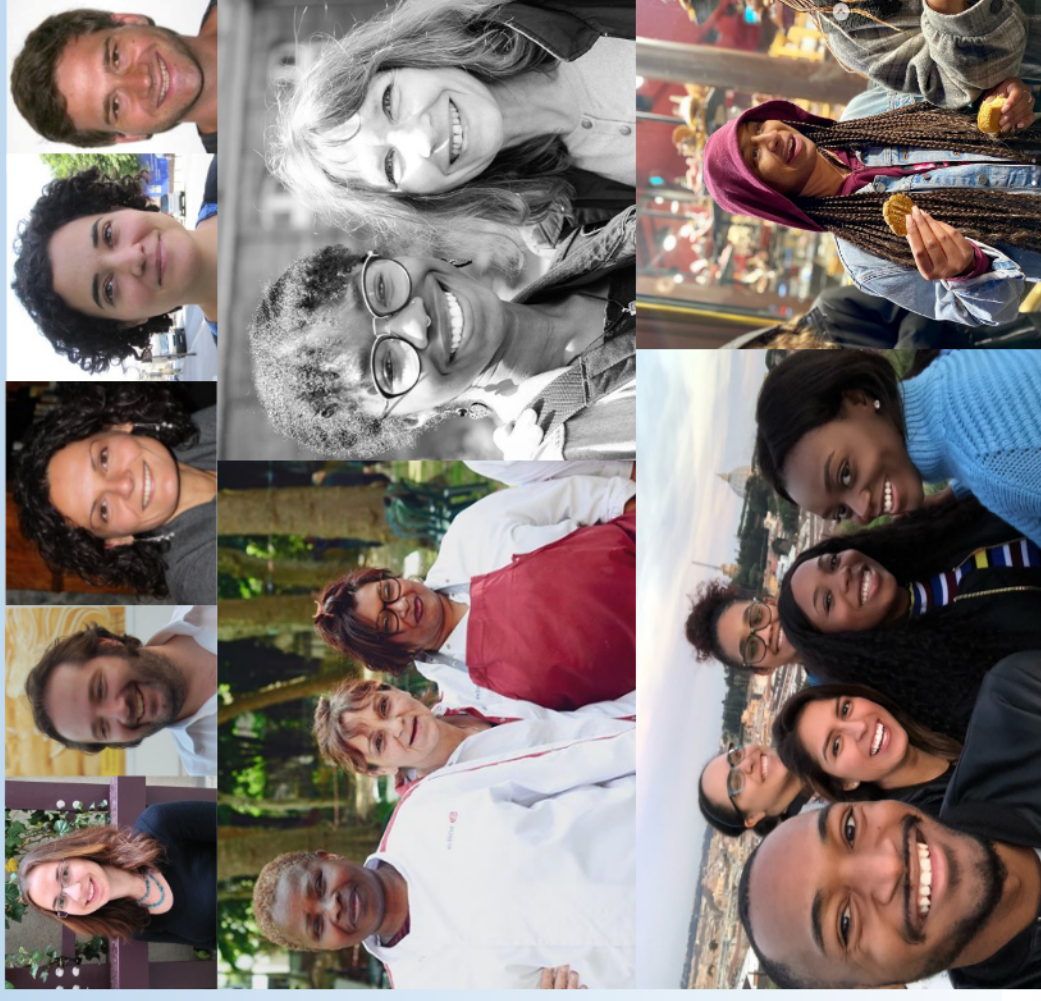
ST. JOHN'S  
UNIVERSITY





# SIOs & Management Across Borders

- Translating institutional norms
- Anticipating & addressing cultural challenges
- Recruiting and retaining staff
- Considering the role of local collegial networks, unions, professional development expectations, and more



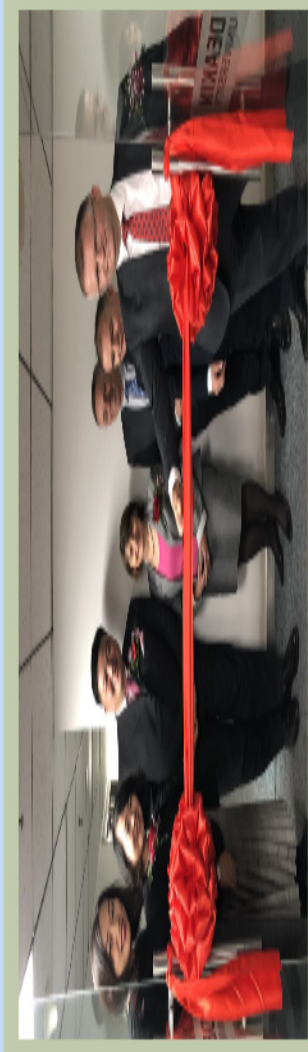
# **Risk Mitigation and Transition Strategies for Offshore SIOs**

**Tori Ellenberger, Director North America  
Deakin University**



# Deakin's Offshore Experience

People



Space



Technology



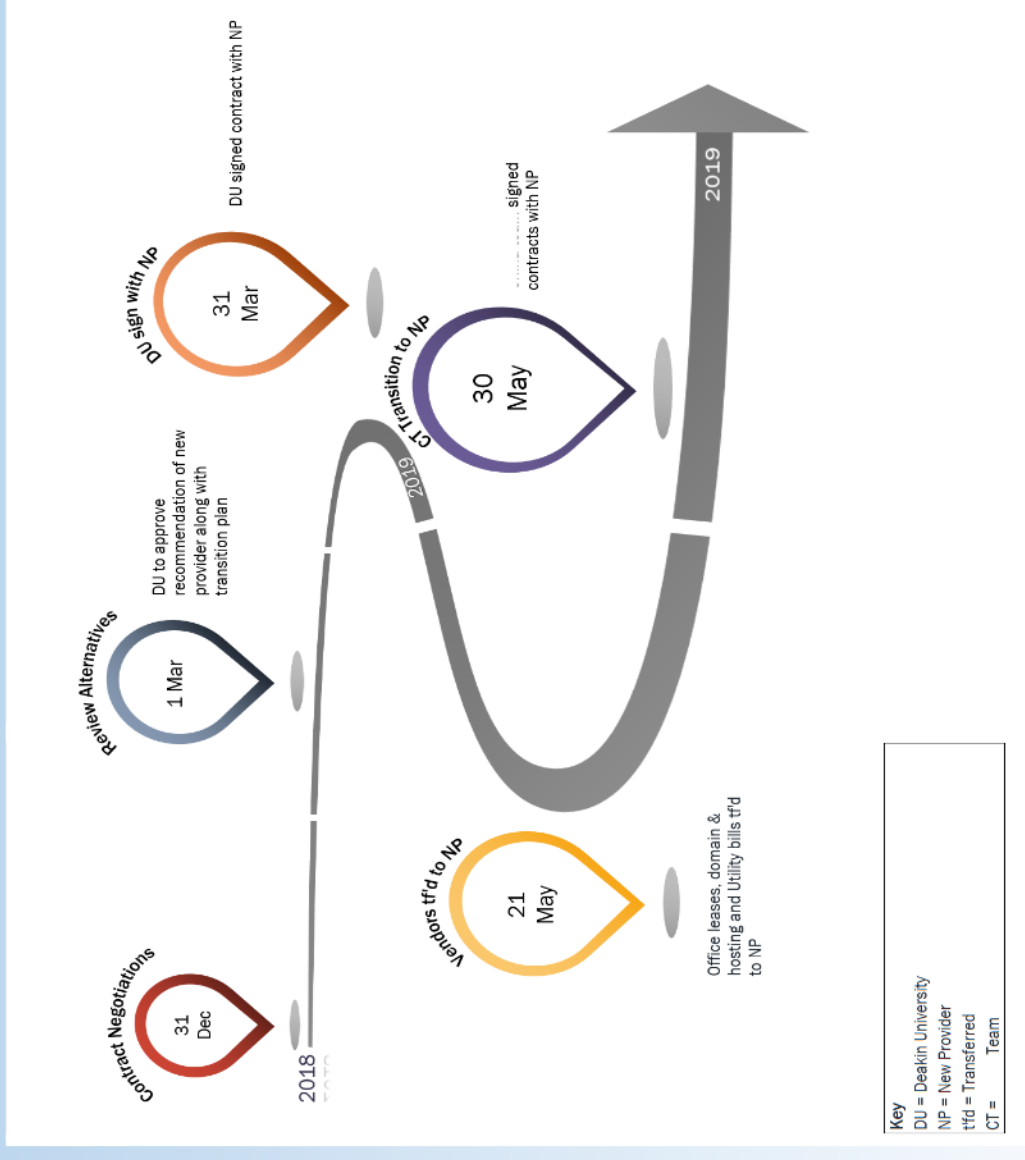
# Transition Strategies

## Timeline & Plan

- Internal resources and approvals
- Negotiating and finalising contract
- Negotiations and transfer of assets

## Communication with stakeholders

## Qualified transition team



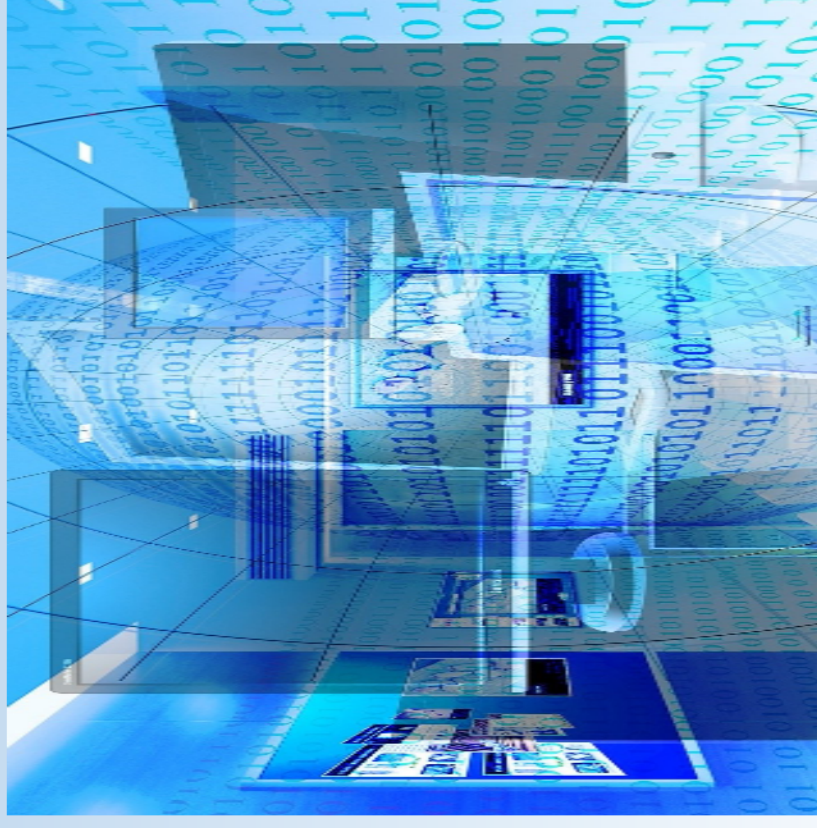


# Risk Mitigation Strategies

Knowledge Capture

Shared contacts

People focussed



# Establishing Offshore Representation Through Service Platform

Brett Berquist, Director International  
University of Auckland



# NZ International Education sector

2017/18

Total economic contribution of international education  
**\$5.1b**

## Top 10 NZ Exports<sup>1</sup>:

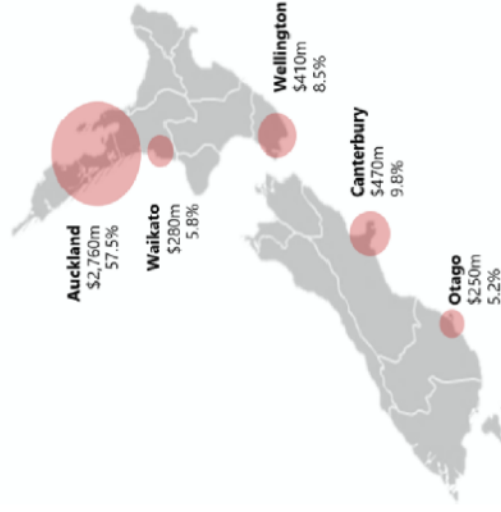


Total value of onshore economic value  
**\$4.8b** (Value Added + tax)  
 \$760m increase since 2016

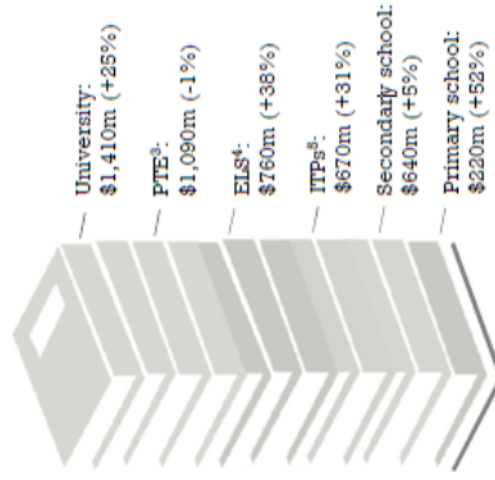
Total value of offshore activity<sup>2</sup>  
**\$0.3b**  
 \$60m increase since 2016

Expenditure by international students supports  
**47,490 jobs**

## Contribution by NZ region: value and proportion of total (Value Added + tax)

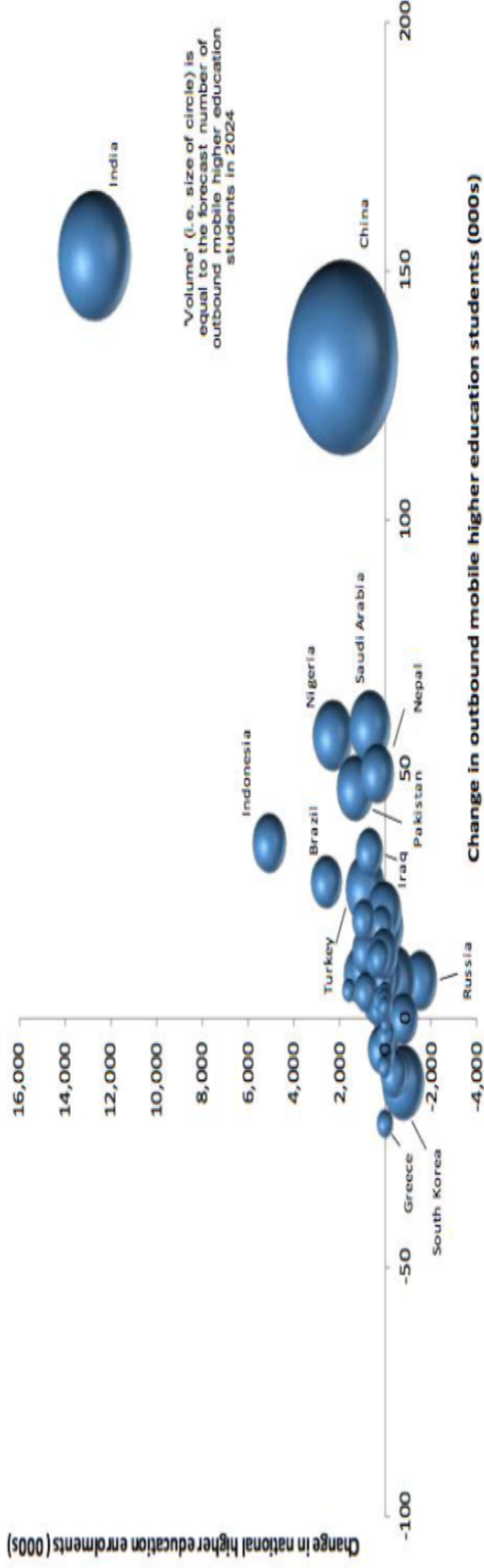


## Sector



Source: Education New Zealand  
 Economic value of international education to New Zealand (infographic)

# China has peaked. Long live India.



Source: Oxford Economics

2016 – 0% increase China outbound



# TNE: What are we doing?

- Joint programming China
- Aulin College
- Dual Master's strategy & joint PhD
- Growing articulation agreements
- Off-shore foundation delivery



# Off-shore Representation - Internal vs. Outsource

Compliance

Talent

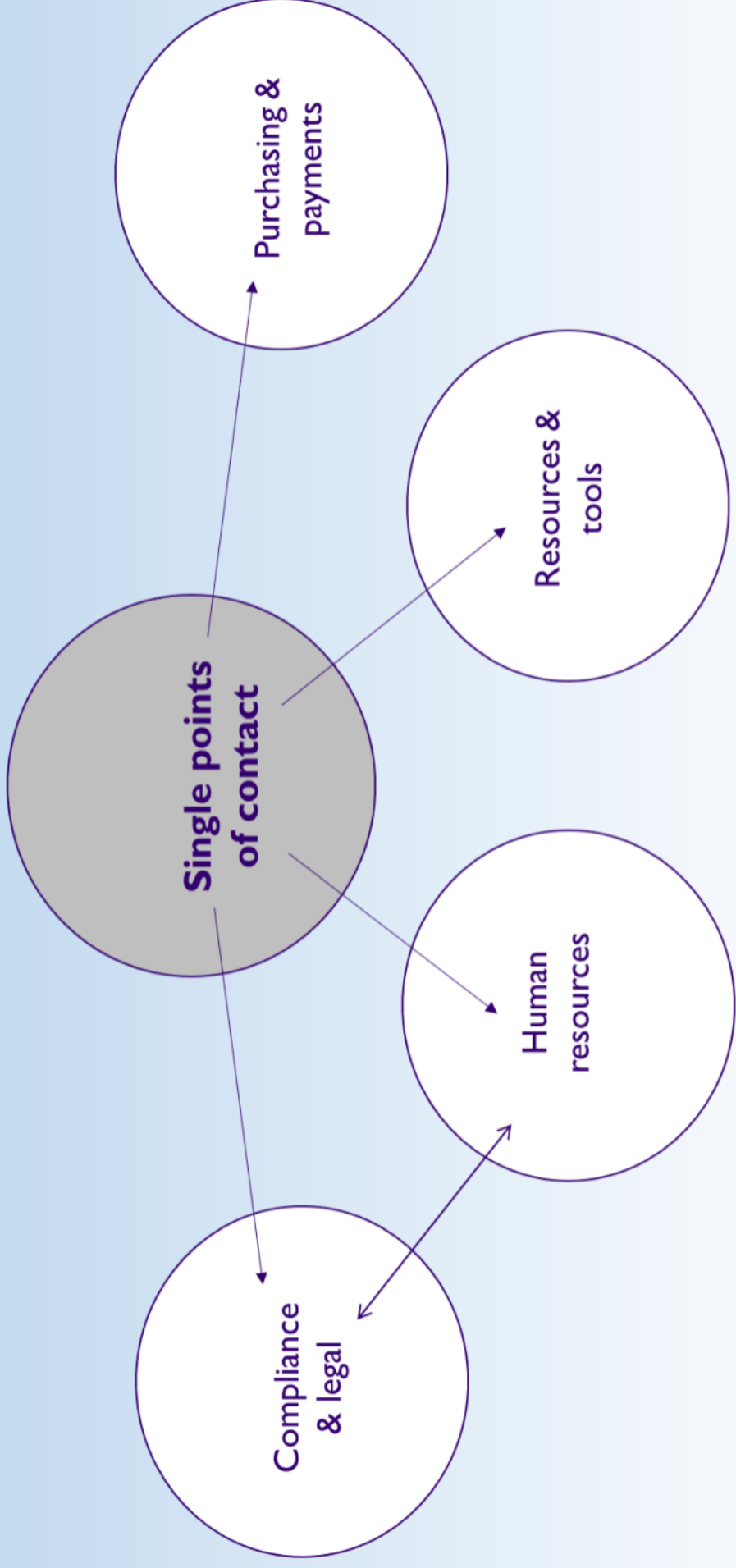
Risk mitigation







# Global Operations Support Identify and Connect Resources





# **UWORLD NGOs in Relevant Locations**

- University controlled Washington non-profit corporation
- University is IRC Section 115 (tax exempt) organization; did *not* seek 501(c)3 status for Uworld
- UWorld allows for registration and complex, long-term operation in multiple countries – currently 14 subsidiaries

**Thank  
you!**