



INTERNATIONAL ALLIANCE OF  
RESEARCH UNIVERSITIES

# **IARU Senior Officers' Meeting 2022**

**University of Oxford**

**19–21 September 2022**

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## Agenda

### Senior Officers' Meeting University of Oxford, 19–21 September 2022

*Meeting venue: Research Centre, Christ Church, University of Oxford*

#### Monday, 19 September

*Check in is at 15:00 for those booking into accommodation at Christ Church.*

16:00            Tour of Pitt Rivers Museum (Optional)

#### Evening

17:15            Transport from Pitt Rivers to Trout Inn

17:30            Pre-dinner drinks, Trout Inn

18:00            Welcome Dinner, Trout Inn

20:30            Transport back to Christ Church

#### Tuesday, 20 September

07:30–09:00    Breakfast in Christ Church Hall

09:00            Welcome  
*Mr Andrew Brown (OXF)*  
*Dr Karen Kennedy (Secretariat, CAM)*

09:15            **Session 1: Regional Round-Up**

10:15            Morning break

10:30            **Session 2: Discussion of Regional Round-Up**

11:15            **Session 3: Universities' responses to international crises and refugees**

12:15            Photo session

12:30            Lunch

13:30            **Session 4: Presentation by the Oxford Character Project**  
*Dr Edward Brooks, Oxford Character Project*

14:30            **Session 5: Education Initiatives**  
5.1            IARU Courses  
5.2            Global Internship Program

15:15            **Session 6: Research-Related Initiatives**  
Ageing, Longevity and Health Initiative

15:30            Afternoon break

- 16:00      **Session 7: Institutional Joint Working**
- 7.1      Alumni Associations Network
  - 7.2      Cybersecurity Forum
  - 7.3      Gender Group
  - 7.4      Global Transformation
  - 7.5      HR Consultation Group
  - 7.6      Librarians' Contact Group
  - 7.7      Lifelong Learning
  - 7.8      Novo Nordisk International Talent Program
  - 7.9      Real Estate Working Group
  - 7.10     Sustainable Campus Initiative
  - 7.11     Virtual Museum Tours

17:00      End of second day

Evening

19:00      Pre-dinner drinks, St Peter's College

19:30      Dinner, St Peter's College

**Wednesday, 21 September**

07:30–09:00    Breakfast in Christ Church Hall

09:00      **Session 8: Expanding IARU membership into Latin America: Interim Report**

09:15      **Session 9: Update on Secretariat Proposals**

- 9.1      IARU Handbook
- 9.2      Education Initiatives Committee
- 9.3      Early-Career Collaboration Grants Scheme (Revised)

10:30      Morning break

10:45      **Session 10: IARU Business Matters**

- 10.1     Scheduling of meetings
- 10.2     Rotation of Chair and Secretariat
- 10.3     Financial Report
- 10.4     Financial planning and membership fees
- 10.5     Suggestions for the agenda for PM 2023, ETH Zürich
- 10.6     Date and Host for PM 2024 and SOM 2023

12:15      Thank you and farewells  
*Mr Andrew Brown (OXF)*  
*Dr Karen Kennedy (Secretariat, CAM)*

12:30      Lunch

13:30      End of third day, end of meeting

13:45      Walking tour of Oxford (optional)  
*Meet at the blue gates of Trinity College, Broad Street.*

15:15      Walking tour concludes

## Participants

### **Australian National University**

Mr Jonathan DAMPNEY – *Director, ANU International Office*

### **ETH Zürich**

Dr Jürg Brunnschweiler – *Chief of Staff to the President*

### **National University of Singapore**

Professor WONG Reuben – *Associate Vice President (Global Relations)*

Mr ONG Randall - *Associate Director (Networks & Alliances), Global Relations Office*

### **Peking University**

Dr LI Yun – *Deputy Director Director, Office of International Relations (attending online)*

### **University of California, Berkeley**

Vice Provost Lisa ALVAREZ-COHEN – *Vice Provost for Academic Planning*

### **University of Cambridge**

Dr Karen KENNEDY – *Director, Strategic Partnerships Office*

Ms Renata SCHAEFFER – *Head of Public International Partnerships, Strategic Partnerships Office*

Dr Rob SING – *Research Analyst, Strategic Partnerships Office*

Ms Hannah FLEWITT – *International Projects Coordinator, Strategic Partnerships Office*

### **University of Cape Town**

Ms Carolyn NEWTON – *Director, Global Engagement*

### **University of Copenhagen**

Ms Tobi Egelund – *Academic Officer*

Ms Hedvig Gyde Thomsen – *Head of International Strategic Partnerships & Alliances*

### **University of Oxford**

Mr Andrew BROWN – *Senior International Officer*

### **The University of Toyko**

Professor KITAMURA Yuto – *Professor, Graduate School of Education (attending online)*

Ms TOYOKI Makiko – *Assistant Manager*

Ms OGUCHI Mao – *Administrative Staff*

### **Yale University**

Mr. Don FILER – *Associate Vice President, Global Strategy*

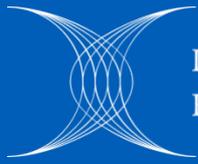


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## **Session 1: Regional Round-Up**

Discussion on global trends in higher education, including developments in the respective partners' countries and any other matters of interest to IARU. Senior Officers are invited to share the key initiatives, developments, and challenges of their universities.

*(no paper)*



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## **Session 2: Discussion of Regional Round-Up**

This session offers the opportunity to explore the issues raised by IARU members in the preceding regional round-up.

*(no paper)*



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## **Session 3: Universities' responses to international crises and refugees**

*(no paper)*

### **Session 3: Universities responses to international crises**

This session will consider the role universities can play in offering support and assistance to those who are affected by international crises or who have been displaced by war, or other conflicts. Funded residential placements for students and academics, hardship funds for current resident students affected by international conflict, and remote access to resources for students and academics in warzones are all ways in which higher education institutions can provide assistance. If they wish, Senior Officers can share their own universities' position on providing support in times of international crisis and assisting refugees. The group as a whole will then discuss what policies can be put in place, what practical help universities can offer (including resources needed) and how this may change in the future.



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## **Session 4: Presentation by the Oxford Character Project**

Speaker:

**Dr Edward Brooks**

*Executive Director, Oxford Character Project  
University of Oxford*

*(no paper)*

## Session 4: Presentation from the Oxford Character Project

Founded in 2014, the Oxford Character Project joins cutting edge research on character and leadership in the humanities and social sciences to the design and delivery of student programmes at the University of Oxford and in partnership with other leading global universities and commercial organisations. We are currently undertaking a major research project on character and responsible leadership in UK businesses, as well as an international project investigating leadership development in the Global South in partnership with academics from Africa, Central Asia, East Asia, Europe, Latin America and North America.

Dr Brooks will introduce the work of the Oxford Character Project and share learnings from its research and programmes, focusing on the opportunity and importance of advancing intentional character and leadership education in higher education institutions around the world.

### Speaker



#### **Dr Edward Brooks**

*Executive Director, Oxford Character Project*

Dr Edward Brooks is the Executive Director of the Oxford Character Project. His research lies at the intersection of virtue ethics, character and leadership development. Particular interests include the virtue of hope, the relationship between character and culture in commercial organisations, leadership for human flourishing, and exemplarist moral theory. Edward heads the research and programmes of the Oxford Character Project and has designed and delivered character and leadership development programmes for universities and commercial organisations around the world. He is currently working on a book on the virtue of hope and an edited volume on *The Arts of Leading: Perspectives from the Humanities and Liberal Arts*.



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## **Session 5: Education Initiatives**

- 5.1 IARU Courses
- 5.2 Global Internship Program

## 5.1 2022 IARU Courses

<b>Lead</b>	n/a
<b>Reporting</b>	<i>IARU Secretariat</i>
<b>Executive summary</b>	<p>There has been a rise in students attending IARU Courses, which is encouraging given that travel restrictions have eased in many countries. A total of 18 courses were offered by 9 institutions and attended by 89 students. (For comparison, in 2021 there were 17 courses offered by 8 institutions with 51 students attending.)</p> <p>In 2022, there seemed to be a fairly even split of student attending online vs in-person for the courses where this information was available. 25 students attended in person, with 29 attending online and there was no data for the remaining 35 students.</p> <p>Although it is a positive sign that student numbers have improved, it should be noted that attendance is still not at the level of the previous Global Summer Program (2018: 23 courses from 10 universities with 299 students attending), which also benefitted from the Santander scholarship funding. The continued impact of travel restrictions for some countries has made it hard to assess the degree to which the loss of the Santander funding has affected applications.</p>
<b>Items for decision</b>	None
<b>Funding to date</b>	<i>n/a</i>
<b>Outcomes of previous meetings</b>	<p><b>Senior Officers' Meeting, October 2021</b> The take up of IARU courses continued to be affected by the pandemic. A total of 17 courses were offered by 8 institutions and attended by 51 students. The Secretariat was holding \$2,500 on behalf of both UCPH and UCT, which was left over from the Santander-sponsored Global Summer Exchange Programme, which ended in 2018. Santander had recently confirmed that IARU was free to use these funds as it wishes. The Secretariat proposed that these funds remain with UCPH and UCT to be used to support general student exchange between IARU universities, as they saw fit. Senior Officers approved this proposal.</p> <p><b>Senior Officers' Meeting, October 2020</b> Most of the 2020 IARU Courses were cancelled or postponed to 2021 due to the COVID-19 pandemic. a total of 12 courses were offered online by 4 universities and attended by a cumulative total of 65 students from 8 universities. IARU Courses had carried over funds from 2019, but as students could not travel, no one used the funds. It remains unclear when IARU Courses would be able to resume its activities that involves student travel and in-person interaction. The Secretariat have asked Banco Santander whether it is possible to return the unconsumed funds</p>

this August; however, the Secretariat have not yet received their answer. The Secretariat will continue to remind them. An online meeting was held by PKU in May 2019, and IARU Courses Coordinators from ten member universities participated. All of them were concerned about finance, as most of the units offering courses are self-financed units in their institutions. However, they believed online courses had merits and expressed their enthusiasm to explore for new forms of cooperation for the future. There was no funding request.

#### **Senior Officers' Meeting, September 2019**

Masaki Kato (IARU Secretariat) reported that the 2019 IARU Courses offered 43 courses from 9 partner universities. Out of the 43 courses, 13 were previously established Global Summer Program (GSP) courses, 3 were newly added, and 27 were general summer school courses. A cumulative total of 129 IARU students participated from 9 universities. The number of students attending IARU courses was less than a half of that attending 2018 GSP courses probably due to the termination of Banco Santander funding for student scholarships.

Several institutions had remaining Santander funds as carryovers from 2018. In February Banco Santander authorized the unconsumed funds to be used towards student travel for IARU courses. As a few universities still could not use up the carryovers in 2019, they will be used for 2020 IARU Courses. The Secretariat will submit a report to Santander twice, by the end of 2019 and 2020 respectively.

It was the first year that IARU Courses were held as a replacement for GSP, shifted to a more decentralized system. The details of IARU courses were listed on the official website, but, as agreed, IARU was not involved in the operation of the IARU courses, such as in the application process, or with student surveys and improvement of IARU courses. Some universities decided not to appoint a specific staff to be in charge of IARU Courses from this year. Senior Officers agreed that appropriate information sharing among institutions continues to be required as a follow-up to changes in the operation system.

Kiichi Fujiwara (UTokyo) requested partners' support to renew the MoU (Memorandum on student exchange for the global summer program within the IARU that was signed at Presidents' Meeting (PM) 2014), which UTokyo needs in order to receive students from member institutions to IARU Courses held at UTokyo. The IARU Secretariat will approach key contacts to get Presidents' signatures when the MoU is ready.

#### **Senior Officers' Meeting, September 2018**

Rexille Uy (IARU Secretariat) reported that the 2018 Global Summer Program offered 23 courses from ten partner universities. 299 IARU students participated from all eleven universities. Banco Santander contributed one final year of

funding in the amount of USD 200,000 to the 2018 GSP. 135 students were awarded Banco Santander scholarships. At the end of the 2018 GSP, a combined carryforward of USD 14,000 remained of Banco Santander funds. This carryforward is mostly due to enrolled students dropping out of the program too late for their awards to be given to other GSP students. The IARU Secretariat is currently checking with Banco Santander to see if the carryforward funds can be used for future IARU student mobility opportunities.

The 2018 GSP Working Committee Meeting took place on 16-17 September at ETH Zürich, immediately before SOM2018. The following outcomes, as agreed on by the GSP Coordinators, were reported verbally by the IARU Secretariat:

### **GSP in 2019**

The majority of GSP Coordinators remain enthusiastic and determined to offer summer courses to allow for IARU student mobility and exchange.

For 2019, summer courses will no longer be classified under the "Global Summer Program," but rather, will be listed on the IARU website under "**IARU Courses**." Enrolled students will be called IARU Scholars. The following operational changes will also take effect:

- IARU universities may offer up to four courses under this umbrella. Some universities have already stated they will offer no courses for 2019.
- Each course name and description will be accompanied by a link to the host institution's application platform. The application process will, therefore, be entirely decentralized in 2019.
- Host institutions will be responsible for reviewing applications and selecting incoming IARU students for their summer courses. Host institutions will set their own application deadlines and acceptance notification dates.
- Students will be responsible for paying tuition to the host institution. Eligibility for financial aid and credit will be determined by the home university. Some universities have stated they can offer tuition discounts for incoming IARU Scholars as an incentive to apply for their courses.

### **Beyond 2019**

Coordinators agree that possibilities for seeking outside funding ought to be explored. Since this topic was last discussed at the GSP meeting in 2017, little progress has been made in finding other sources of financing.

Coordinators are requesting funding from the Senior Officers of USD 10,000 for 2019 to host one or more meetings, possibly in conjunction with conferences already attended by a vast majority of GSP Coordinators. Meetings are an integral part of the

development, planning, assessment, and improvement of IARU Courses, especially during the first year of the program. Coordinators see value in meeting face-to-face to best carry forward projects already in the planning stages, such as collaborating on future Joint-Online courses, seeking outside sources of funding, expanding IARU Courses to include semester- and year-long curriculum, and developing an IARU Global Leadership Program that combines online courses and internship opportunities.

There is a consensus that the administrative mechanism created by the Coordinators has been successful and there is value in this established network. The network has generated many positives for IARU, such as the dual degree program between UC Berkeley and NUS, the Global Transformation Field Course led by UCPH and UC Berkeley, the Global Internship Program between Berkeley & Tokyo and Berkeley & NUS, in which several hundred students per year participate, faculty teaching exchanges between UCPH, with Oxford, NUS and Yale, and the UC Berkeley summer program at Oxford. Students who have previously participated in GSP have also gone on to enroll in graduate programs at the IARU university at which they studied. There is a consensus that GSP has run its course and should evolve into a general student mobility program with opportunities for faculty exchange.

**Takeaways:**

The Senior Officers deliberated the outcomes from the 2018 GSP Working Committee Meeting and supported the plan submitted by the GSP coordinators to formally end GSP and replace it with "IARU Courses," offering student mobility opportunities on the IARU website, decentralizing the application process, and including programs that run outside of the summer term.

The IARU Senior Officers unanimously acknowledged the contributions made by the GSP coordinators in administering the GSP program over all these years and thank them for their efforts. With the conclusion of the Global Summer Program, Senior Officers did not approve the request of USD 10,000 to hold a meeting in 2019 but suggest that the group convene virtually to coordinate course offerings or arrange logistics as needed.

In addition, the Senior Officers discussed other ways to increase student opportunities between IARU universities and concluded that a new committee--or committees--should be formed to develop these ideas further. The new committee(s) may include some members of the GSP, although institutions may nominate a different individual.

**IARU Courses****2022 IARU Courses**

CAM	Summer Programme
NUS 1	FASStrack Asia: The Summer School
NUS 2	Global Science Summer Programme
OXF 1	English Literature Summer School
OXF 2	History, Politics & Society Summer School
OXF 3	International Politics Summer School
OXF 4	Statistical Genomics Summer School
PKU 1	Arts of Chinese Traditional Performance
PKU 2	Belt & Road Initiative and the International Practice from the Perspective of New Structural Economics
PKU 3	Flower in the Mirror: the Chinese Values
PKU 4	The Rise of China and Change in World Politics
UCB 1	Disc* (Design & Innovation for Sustainable Cities)
UCB 2	Summer Sessions
UCPH	Cultural Rights: A Promising Global Discourse?
UCT 1	Afropolitanism, Social Justice and Entrepreneurship, Personal Mastery (Leadership & Mindfulness) and Design Thinking
UCT 2	Sustainable Water Management
UTOK	Global Unit Courses
YALE	Summer Session

## 5.2 Global Internship Program

<b>Lead</b>	n/a
<b>Reporting</b>	<i>IARU Secretariat</i>
<b>Executive summary</b>	<p><b>GIP 2022</b></p> <p>In 2022, Oxford offered a graduate student internship at the Oxford Institute of Population Ageing. However, only one application was received but, as the applicant was an Oxford student, she was not eligible for the internship. Oxford intend to offer the same internship again in 2023.</p> <p>To encourage wider participate, the Secretariat has proposed to increase the value of the internship to \$3,000, as it is anticipated that not every IARU institution will offer internships in 2022-23. This proposal was circulated to Senior Officers in August 2022. The Secretariat will report on whether the increased funding has had an effect on applications.</p> <p><b>GIP 2021</b></p> <p>Three universities (Peking, Oxford, UTokyo) offered a total of eight internship positions across three different programs. UTokyo and Peking each selected a single intern, Oxford four (although only 2 engaged). The internships were successfully completed online at Peking and Oxford. However, the in-person UTokyo internship was initially delayed due to travel restrictions and, in the end, the student was unable to take up the opportunity due to her dissertation deadline.</p>
<b>Funding to date</b>	<p>22,000 USD                      <i>GIP (2021)</i></p> <p>---</p> <p>22,000 USD                      GIP (2020)</p> <p>10,000 USD                      NUS, UCPH, Oxford, UTokyo, Yale (2019)</p> <p>8,000 USD                        UCPH, Oxford, UTokyo, Yale (2018)</p>
<b>Outcomes of previous meetings</b>	<p><b>Senior Officers' Meeting, October 2021</b></p> <p>As in previous years, a request of USD 22,000 was made (USD 2,000 per member university) and was approved by Senior Officers. The programme continues to be impacted by COVID. Travel restrictions had no doubt deterred some from applying, and in some cases had delayed people taking up their internship (as is the case with UTokyo). Oxford transferred its internship online. The student feedback from the virtual internships had been very positive.</p> <p>It was hoped that next year would see improved international travel, enabling greater take up of exchange opportunities, and an expansion of the programme. Oxford and Copenhagen had already informally expressed interest for next year.</p>

### **Senior Officers' Meeting, October 2020**

Three universities, Oxford, UTokyo and Yale, planned to offer a total of four internship programs this year; however, UTokyo and Yale decided to cancel them due to the COVID-19 pandemic. Oxford selected two interns after extending their deadline for applications, and started conducting their program this October. GIP submitted funding request, aiming to provide USD 2,000 to each university that plans to offer GIP in 2021. As supplemental information, it was mentioned that a total of five universities have contributed in this initiative up until now and according to the survey carried out by the Secretariat last year, both the intern and coordinators felt that the USD 2,000 was effective in promoting the program. Nina Tomlin (Oxford) stated that the funding provides an important incentive to the Oxford Institute of Population Ageing to hire an intern from one of IARU member universities every year. Carolyn Newton(UCT) commented that for many students at UCT, participating in internship programs at other IARU universities has been a challenge because they could not afford to pay the cost even with the support of USD 2,000. However, if internship program can be provided virtually, it could give chances to students at UCT to participate. Kiichi Fujiwara pointed out that new budget request guideline allows each university, if necessary, to request more than the standard amount.

### **Senior Officers' Meeting, September 2019**

As of 2019, five universities (NUS, Oxford, UCPH, UTokyo, and Yale) offered internship opportunities. A grant of USD 2,000 was given to each of these universities from IARU central funds. As feedback from participating universities was requested at Senior Officers' Meeting (SOM) 2018, the Secretariat collected feedbacks about the financial support from one intern and three coordinators. All of them expressed positive impression towards the program, and coordinators regarded the USD 2,000 as crucial incentive for interns to participate in GIP, even though it only covers a small portion of the travel and living costs. The intern stated that the level of GIP was quite intense and she had a great experience, but the internship would have not been financially feasible without the funding support due to high cost of living.

Anders Hagström (ETH Zürich) reported that strict visa and work permit rules have prevented them from providing GIP for students from non-European countries.

Senior Officers agreed to continue GIP. If each IARU university submits a proposal, the maximum funding amount allocated for GIP in 2020 would be USD 2,000 per university, for a total of USD

	22,000. Proposals will be automatically approved as they are received by the IARU Secretariat and posted to the IARU website.
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## 2021 Global Internship Program Positions

Three universities (Peking, Oxford, UTokyo) offered a total of eight internship positions across three different programs. UTokyo and Peking each selected a single intern, Oxford four. The Secretariat asked those students who have so far completed their internships for feedback.

### Peking University

PKU received two applications and accepted a student from UCPH. The online internship ran March-April 2021. The internship was based at the Arthur M. Sackler Museum of Archaeology and Arts at Peking University. The intern's responsibilities included assisting the leading faculty and curator as the Curatorial Assistant, and assisting the IARU coordinator for the promotion of IARU Virtual Museum Tours.

### University of Oxford

Oxford's internal application deadline was moved from April to October 2020, so the internships in practice spanned 2020/21. Four interns were accepted but only two engaged; one student from PKU and another from UCPH. The internships were based at the Oxford Institute of Population Ageing, a multidisciplinary research institute concerned with the processes and implications of global demographic change. The interns were able to engage in graduate level, multidisciplinary research on different aspects of population ageing.

Both students engaged in all institute events (formal seminars, informal seminars and reading groups), which collectively provided a comprehensive insight into global ageing issues. Both interns presented on their work. Both worked with the institute for the whole 2020-2021 academic year.

One of the interns kindly provided detailed feedback to the Secretariat. They praised the learning experience as flexible and rigorous, adding that they received excellent support. They also noted that while the original internship was to run for three months, the student's decision to participate virtually due to travel restrictions allowed them to continue working with the Institute, for which the student was very grateful. In this time they received further feedback on their work and continued to benefit from the institute's online seminars.

### University of Tokyo

Three internship positions were advertised. One student was accepted. The student, from ETH, actually applied for two of the three internships and was accepted for both. However, due to Covid-related travel restrictions the student was not able to commence their studies immediately and eventually had to decline the internship due to her thesis deadline.

## Global Internships Program Background

The Global Internship Program was proposed by the Senior Officers during the SOM2017 to provide students from IARU member universities opportunities to engage in an internship at another IARU member university. Universities that are interested in providing such internship opportunities may submit a proposal, and with the Senior Officers' approval USD 2,000 will be allocated per university.

In 2021, as in 2020, the ongoing difficulty of international travel interfered with the running of the GIP. However, whereas only one university was able to offer an internship opportunity in 2020, three universities offered positions in 2021. The students spoke very highly of the quality of the instruction and support that they received. The Secretariat has distributed information about the GIP to key contacts

in anticipation of its potential continuation in 2022, noting the greater accessibility of internships that are either wholly or partly virtual.

GIP is an important way for IARU member universities to provide their students, faculty and staff opportunities to engage in a collaborative and creative effort with other IARU members. Its full potential has yet to be realised. It is anticipated that, as international travel becomes more feasible over the next twelve months, a greater number of IARU members will offer opportunities and more students will apply, thereby increasing the importance and impact of the programme.

## Funding Request Form

### Project Name/Year:

2023 Global Internship Program

### Total Requested Amount & Breakdowns:

Item	Amount
A grant of up to USD 2,000 per university (on a request basis)	USD 22,000
<b>Total Requested Amount</b>	<b>USD 22,000</b>

\*Please note that it is required to report how the approved funding is actually used and the outcomes later in the annual status report.

### Other Financial Resources (if applicable):

Depending on institutions, there could be other financial resources that support the internship program.

### Participants List (Please specify the lead by adding "Lead" next to the name):

The Secretariat is the lead in this initiative.

University	Name of the institution	Years when programs held
<b>ANU</b>		
<b>ETH Zurich</b>		
<b>NUS</b>	Global Relations Office	2019
<b>PKU</b>		2021
<b>Berkeley</b>		
<b>Cambridge</b>		
<b>UCT</b>		
<b>Copenhagen</b>	UCPH Global Development, Faculty of Social Science	2018, 2019
<b>Oxford</b>	Institution of Population Ageing	2018, 2019, 2020, 2021, 2022
<b>UTokyo</b>	School of Science	2018, 2019, 2021
<b>Yale</b>	Office of International Affairs	2018, 2019

\*The list does not need to be complete in case not all participants are confirmed yet.



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## **Session 6: Research Initiative**

Ageing, Longevity and Health Initiative

## 6 Ageing Longevity and Health Initiative

<b>Lead</b>	<i>University of Cambridge</i>																		
<b>Reporting</b>	<i>Dr Louise Lafortune</i>																		
<b>Executive summary</b>	<p>The University of Cambridge hosted the ALH Research Conference online (06/10/21 to 08/10/21), focusing on capacity building, research collaborations and engagement. The objectives were to bring senior and early career researchers together to brainstorm and identify concrete collaborative projects. The workshop sessions raised a number of issues in multidisciplinary ageing research that should provide the building blocks for papers, workshops and conferences as well as opportunities for funding and impactful research projects. Six topics were deemed ripe for useful and sustainable collaborations. In addition to maintaining and developing bilateral collaborations, the group is writing an ALH Research Strategy with clear objectives to guide their work on these topics over the next 2 years and developing an Early Career Researchers' network to engage early career researchers across IARU's membership and concretely integrate them to the ALH Initiative. The aim is to launch the network at the next ALH Conference, to be hosted by University of Copenhagen, 19-21 Oct 2022.</p>																		
<b>Funding to date</b>	<table border="0"> <tr> <td><i>USD 15,000 (2022)</i></td> <td><i>ALH Graduate Student Conference, Copenhagen</i></td> </tr> <tr> <td><i>USD 15,000 (2021)</i></td> <td><i>ALH Research Conference Cambridge</i></td> </tr> <tr> <td><i>USD 15,000 (2020)</i></td> <td><i>ALH Graduate Student Conference, Cape Town</i></td> </tr> <tr> <td><i>USD 11,505.73 (2019)</i></td> <td><i>ALH Research ANU</i></td> </tr> <tr> <td><i>USD 15,000 (2018)</i></td> <td><i>ALH Graduate Student Conference, NUS</i></td> </tr> <tr> <td><i>USD 13,003.20 (2017)</i></td> <td><i>ALH Graduate Student Conference, Oxford</i></td> </tr> <tr> <td><i>USD 14,600 (2016)</i></td> <td><i>ALH Graduate Student Conference, Tokyo</i></td> </tr> <tr> <td><i>USD 15,000 (2014)</i></td> <td><i>ALH Graduate Student Conference, Copenhagen</i></td> </tr> <tr> <td><i>USD 38,000 (2009)</i></td> <td><i>for project management salary, Oxford</i></td> </tr> </table>	<i>USD 15,000 (2022)</i>	<i>ALH Graduate Student Conference, Copenhagen</i>	<i>USD 15,000 (2021)</i>	<i>ALH Research Conference Cambridge</i>	<i>USD 15,000 (2020)</i>	<i>ALH Graduate Student Conference, Cape Town</i>	<i>USD 11,505.73 (2019)</i>	<i>ALH Research ANU</i>	<i>USD 15,000 (2018)</i>	<i>ALH Graduate Student Conference, NUS</i>	<i>USD 13,003.20 (2017)</i>	<i>ALH Graduate Student Conference, Oxford</i>	<i>USD 14,600 (2016)</i>	<i>ALH Graduate Student Conference, Tokyo</i>	<i>USD 15,000 (2014)</i>	<i>ALH Graduate Student Conference, Copenhagen</i>	<i>USD 38,000 (2009)</i>	<i>for project management salary, Oxford</i>
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<i>USD 38,000 (2009)</i>	<i>for project management salary, Oxford</i>																		
<b>Outcomes of previous meetings</b>	<p><b>Senior Officers' Meeting, October 2021</b></p> <p>Requested USD 15,000 for their annual research conference, as in previous years. The 2021 conference was held online the week before the Senior Officers' Meeting, and the organisers were very happy with what was achieved. A report on the conference would be circulated after the meeting.</p>																		

### **Senior Officers' Meeting, October 2020**

As well as the Student activities and annual conference, the emphasis of the theme now includes more bi-lateral collaborations and the production of working papers, academic papers and policy briefs. In addition, several smaller research themes have developed within the broad ALH theme. Outcomes: Successful series of bi-meetings, UCPH's IARU summer school, Conference arranged at Cape Town, October 2020, conference planned at Cambridge, 2021.

### **Senior Officers' Meeting, September 2019**

Nina Tomlin (Oxford) reported that there was a great progress in ageing research collaborations. The Aging, Longevity and Health & Graduate Student Conference (ALH & GSC) is the only research focused group. Senior Officers believed that more progress could be expected by continuous funding support and agreed to fund USD 15,000 for the group's annual meeting and GSC in 2020.

## Funding Request Form

### Project Name/Year:

Ageing, Longevity and Health Theme - Annual Graduate and Research Conference 2023

### Total Requested Amount & Breakdowns:

Item	Amount
Item 1 Conference Support	USD 15,000
Item 2	USD
Item 3	USD
<b>Total Requested Amount</b>	<b>USD 15,000</b>

\*Please note that it is required to report how the approved funding is actually used and the outcomes later in the annual status report.

### Other Financial Resources (if applicable):

### Participants List (Please specify the lead by adding "Lead" next to the name):

University	Title/Position	Name
<b>ANU</b>	Associate Professor	Nicolas Cherbuin
<b>ETH Zurich</b>	-	-
<b>NUS</b>	Associate Professor and Executive Director, Centre for Ageing Research and Education	Angelique Chan
<b>PKU</b>	Director, Institute of Population Research	Xiaoying Zheng
<b>Berkeley</b>	Director, CITRIS Health Initiative	David Lindeman
<b>Cambridge</b>	Principal Research Associate, Cambridge Public Health	Louise Lafortune
<b>UCT</b>	Head and Chair, Division of Geriatric Medicine	Marc Combrinck
<b>Copenhagen</b>	Managing Director, Center for Healthy Ageing	Lene Juel Rasmussen
<b>Oxford</b>	Professor of Gerontology and Director, Institute of Population Ageing	Sarah Haper
<b>UTokyo</b>	Professor of Gerontology	Hiroko Akiyama
	Project Lecturer, Institute of Gerontology	Ikuko Sugawara

<b>Yale</b>	-	-
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\*The list does not need to be complete in case not all participants are confirmed yet.

**Details of the Project (background, purpose, expected outcomes, schedule, project's continuity, etc.):**

\$15,000 is requested for the 2023 Graduate and Research Conference. The location will be confirmed at the 2022 ALH meeting in Copenhagen (October 19-21), which will take place before the Senior Officers' Meeting but after the Tome will be distributed. It will follow on from productive meetings hosted by Tokyo (2016) Oxford (2017), Singapore (2018), ANU (2019), Cape Town (2020), and Cambridge (2021). This will enable the successful continuation of graduate and early career training and development, and the collaborative research strands within the ALH theme.



INTERNATIONAL ALLIANCE OF  
RESEARCH UNIVERSITIES

## **Session 7: Institutional Joint Working**

- 7.1 Alumni Associations Network
- 7.2 Cybersecurity Forum
- 7.3 Gender Group
- 7.4 Global Transformation
- 7.5 HR Consultation Group
- 7.6 Librarians' Contact Group
- 7.7 Lifelong Learning
- 7.8 Novo Nordisk International Talent Program
- 7.9 Real Estate Working Group
- 7.10 Sustainable Campus Initiative
- 7.11 Virtual Museum Tours

## 7.1 Alumni Associations Network

<b>Lead</b>	<i>University of Oxford</i>
<b>Reporting</b>	<i>Christine Fairchild</i>
<b>Executive summary</b>	Due to COVID, IARU Alumni Directors were unable to meet in person in 2021. Instead, a Zoom meeting was convened on 22 May 2021 during which participants shared how they and their teams have adapted to the new way of working and the impact it has had on overall engagement with alumni. A second call took place on 30 September 2021 at which Alumni Directors shared further lessons learnt over the last 18 months, and discussed plans for the next 12 months regarding in-person versus virtual gatherings. We are currently planning our next Zoom catch-up which we expect to be scheduled in the second half of 2022.
<b>Funding to date</b>	<p><i>USD 7,500                      Remaining balance from 1<sup>st</sup> World Alumni Forum</i></p> <p>USD 2,500                      2016 Presidents' Panel (own resources)</p> <p>USD 12,705                      Alumni Association Summit, October 2010</p>
<b>Outcomes of previous meetings</b>	<p><b>Senior Officers' Meeting, October 2021</b></p> <p>The Alumni Associations Network made no budget request at the meeting.</p> <p><b>Senior Officers' Meeting, October 2020</b></p> <p>The IARU Alumni Directors met for the 10th time at NUS on 9-10 December 2019. Alumni directors from six universities (Oxford, ANU, ETH Zürich, PKU, Cape Town and NUS) discussed a wide range of topics from volunteerism to communications, fundraising, international alumni, and how their respective universities were measuring or assessing the value of engagement. They planned to hold the 11th Summit at Berkeley or Cape Town, however COVID-19 forced them to hold a virtual meeting in May instead. There was no funding request.</p> <p><b>Senior Officers' Meeting, September 2019</b></p> <p>Masaki Kato (IARU Secretariat) reported that the Alumni Directors Network held its 9th meeting at PKU on 13-15 December 2018. Alumni directors from five universities (Oxford, ETH Zürich, NUS, UTokyo, and PKU) discussed a variety of topics: the major initiatives underway, how to use alumni donations to support an alumni association and how to better capture and report on alumni impact. The 10th meeting will be held on 9-10 December 2019 at NUS. As the group covers meeting fees by themselves, there was no funding request.</p>

## Alumni Associations Network

Representatives of six of the network's member institutions gathered on 30 September 2021 for an engaging discussion about alumni engagement during the pandemic. In some jurisdictions, member institutions were able to continue to offer in-person events, whereas in many others, digital engagement has become the new normal in the past 12 months. Creative engagement of alumni online has helped to broaden the impact of programming with alumni around the world.

Looking ahead, most institutions will be delivering events in hybrid mode when safe to do so where audiences will participate both in-person and online. It is hoped that there may be an opportunity for Directors to meet in the latter half of 2022. A poll will be conducted before the end of 2021 to gauge interest and seek input about potential dates/times and locations. It was hoped that a panel discussion with the IARU Presidents may be included in the programme for the in-person Presidents' Meeting in Cambridge next year, followed by a reception for IARU alumni. However, after discussion with the Secretariat, it was felt that it would be difficult to guarantee attendance from enough alumni directors to make the panel discussion viable. This idea will be revisited for a future Presidents' Meeting.

## 7.2 Cybersecurity Forum

<b>Lead</b>	<i>ETH Zürich</i>
<b>Reporting</b>	<i>Dr. Rui Brandao</i>
<b>Executive summary</b>	<p>The Cybersecurity Forum 2021 did not take place due to the continued restrictions of the Covid-19 pandemic. Instead, the team met in a series of virtual meetings to discuss cybersecurity challenges during the pandemic and exchange experiences on other selected topics such as zero trust and multi-factor authentication.</p> <p>The group had a (virtual) planning meeting on 28 January 2022 to define topics for discussion and schedule further online meetings. It is planning to meet in person again in late 2022 if the pandemic situation permits.</p>
<b>Funding to date</b>	<p><i>USD 10,000 Cybersecurity Forum (2022 – carried over from 2021)</i></p> <p>---</p> <p>USD 10,000 Workshop (2020), not used due to Covid pandemic, carried over to 2021</p> <p>USD 10,000 Workshop (April 2019)</p> <p>USD 8,000 Workshop (April 2018)</p>
<b>Outcomes of previous meetings</b>	<p><b>Senior Officers' Meeting, October 2021</b> The Senior Officers approved the request to carry over funding for the Cybersecurity Forum 2021 to 2022 (USD 10,000).</p> <p><b>Senior Officers' Meeting, October 2020</b> The Cybersecurity Forum's plan to hold an annual meeting at ETH Zürich in June was cancelled, and it is arranging the dates for an online meeting. Although its concrete plan of activities for 2020 and 2021 remains unclear, the group plans to share the information on new workstyles of faculty and administrative staff under the COVID-19 pandemic, discuss the effect of remote teaching/learning on cybersecurity, and update on focus areas as defined last year, in a virtual meeting. The group submitted a request of carryover of 2020 funding to 2021, which is USD 10,000. Senior Officers approved the request of carryover.</p> <p><b>Senior Officers' Meeting, September 2019</b> The initiative lead transferred from NUS to ETH Zürich. Jürg Brunnschweiler (ETH Zürich) reported that the Cybersecurity Forum was one of the most productive groups that worked on urgent issues. At the second forum on 4-6 April at UCT, the group set their area of focus and principal leads for each task. So far no participants have participated from Yale, Cambridge and UC Berkeley. Each Senior Officer will sound out their chief information officer about attendance at the next meeting in June 2020 at ETH Zürich.</p>



	Senior Officers approved the funding request of USD 10,000 for the next meeting.
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## Cybersecurity Forum 2022

The IARU Cybersecurity Forum (CF) aims to facilitate exchange on cybersecurity topics between IARU members. It was initiated in 2018 at a 2-day inaugural event at NUS. The second Forum took place at UCT in 2019 where several focus areas were identified. Each of the universities attending the CF 2019 agreed to take the lead for one focus area.

The CF 2020 was planned to take place at ETH Zürich. However, the 2020 Forum was cancelled due to COVID-19 related travel and meeting restrictions and the same happened in 2021. The CF is therefore being shifted to 2022. The dates for the CF 2022 will be announced based on how the COVID-19 situation evolves. We hope that we can host the event in the first half of 2022 at ETH Zurich.

Currently, we plan to have two streams for the CF 2022:

### Stream 1: Key Focus Areas

Sharing information on the key focus areas identified at the workshop in Cape Town:

- KPI framework – principal lead: National University of Singapore (NUS).
- Risk tolerance framework – proposed principal leads: University of Tokyo and National University of Singapore (NUS)
- Connectivity per team – principal lead: ETH Zürich
- Benchmarking – principal lead: University of Cape Town (UCT)
- Policy development/ discussion – principal lead: University of Copenhagen
- Intelligence sharing – principal lead: Australia National University (ANU)

This stream is intended for participants on CIO or CISO level.

### Stream 2: Sharing amongst CERTs

We would like to extend the invitation for 2021 to leading members of your Computer Emergency Response Teams (CERT). The idea is to launch a more technical stream, where members of CERTs can share information and experiences with peers of other universities on a more technical level.

## Cybersecurity Forum Meetings 2021

In 2021 the team met in a series of virtual meetings due to the continued restrictions of the Covid-19 pandemic.

- Cybersecurity during the pandemic: Challenges and actions taken by the participating universities.
- Further ongoing cybersecurity initiatives of the participants
- Presentation and discussion of the Public Key Infrastructure service provided by ETH Zürich's internal IT Services
- Multi-Factor Authentication at the University of Cape Town
- Multi-Factor Authentication and Zero Trust at the University of Oxford
- ID integration at the University of Tokyo

## Funding Request Form (Carryover request)

### Project Name/Year:

IARU Cybersecurity Forum 2023

### Total Requested Amount & Breakdowns:

Item	Amount
Transfer amount for Cybersecurity Forum 2022 to 2023	USD 10,000
<b>Total Requested Amount</b>	<b>USD 10,000</b>

\*Please note that it is required to report how the approved funding is actually used and the outcomes later in the annual status report.

### Other Financial Resources (if applicable):

n.a.

### Participants List (Please specify the lead by adding "Lead" next to the name):

Registration for the event was not started yet. We intend to invite the following people:

University	Title/Position	Name
ANU	Chief Information Security Officer	Suthagar Seevaratnam
ETH Zurich	CIO	Rui Brandao (Lead)
ETH Zurich	Chief Information Security Officer	Domenico Salvati
ETH Zurich	Chief IT Security Officer	Anja Harder
ETH Zürich	Head IT-Security Center	Thomas Richter
ETH Zürich	Head Proactive Security	Stephen Sheridan
NUS	Associate Director, Strategies and Development, NUS IT	Caren Chua
NUS	Chief IT Officer	Tan Shui-Min
NUS	Associate Director, IT Security	Ang Leong Boon
PKU	Professor of Engineering, Vice Director, Computer Center	Ma Hao
PKU	Senior Engineer, Vice Director, Network Information Group, Computer Center	Yang Jia
PKU	Engineer, Application and System Group, Computer Center	Gao Zhitong
UTokyo	Professor, Information Technology Centre, Network Research Division	Yuji Sekiya
UTokyo	Associate Professor, Information Technology Centre	Masaya Nakayama

<b>Berkeley</b>	Chancellor	Carol Christ
<b>Cambridge</b>	Chief Information Security Officer	Vijay Samtani
<b>Cambridge</b>	Chief Information Security Officer	Gabriela Ahmadi-Assalemi
<b>UCT</b>	Director, Enterprise Infrastructure Services	Andre le Roux
<b>UCT</b>	Systems Engineer	Gudo Munyaradzi
<b>UCT</b>	Systems Engineer	Leon Vanniekerk
<b>UCT</b>	Systems Engineer	Ghamza Jacobs
<b>Copenhagen</b>	Chief Information Security Officer	Thomas Schlichting
<b>Oxford</b>	Chief Information Security Officer	Graham Ingram
<b>Oxford</b>	CIO	Anne Trefethen
<b>Yale</b>	Associate Director for IT Security Strategy	Morrow Long

\*The list does not need to be complete in case not all participants are confirmed yet.

### Details of the Project (background, purpose, expected outcomes, schedule, project's continuity, etc.):

#### **Cybersecurity Forum 2023**

The IARU Cybersecurity Forum (CF) aims to facilitate exchange on cybersecurity topics between IARU members. It was initiated in 2018 at a 2-day inaugural event at NUS. The second Forum took place at UCT in 2019 where several focus areas were identified. Each of the universities attending the CF 2019 agreed to take the lead for one focus area.

The CF 2020 was planned to take place at ETH Zürich. However, the 2020, 2021, and 2022 Forums were cancelled due to COVID-19 related travel and meeting. The CF was shifted to 2022 and we now apply for a budget shift to 2023.

We hope that we can host the event in the first half of 2023 at ETH Zurich.

Currently, we plan to have two streams for the CF 2023:

#### Stream 1: Key Focus Areas

Sharing information on the key focus areas identified at the workshop in Cape Town:

- KPI framework – principal lead: National University of Singapore (NUS).
- Risk tolerance framework – proposed principal leads: University of Tokyo and National University of Singapore (NUS)
- Connectivity per team – principal lead: ETH Zürich
- Benchmarking – principal lead: University of Cape Town (UCT)
- Policy development/ discussion – principal lead: University of Copenhagen
- Intelligence sharing – principal lead: Australia National University (ANU)

This stream is intended for participants on CIO or CISO level.

### Stream 2: Sharing amongst CERTs

We would like to extend the invitation for 2023 to leading members of your Computer Emergency Response Teams (CERT). The idea is to launch a more technical stream, where members of CERTs can share information and experiences with peers of other universities on a more technical level.

### 7.3 Gender Group

<b>Lead</b>	<i>Yale University</i>
<b>Reporting</b>	<i>Dr Karen Lee Anderson</i>
<b>Executive summary</b>	<p>This report contains:</p> <ol style="list-style-type: none"> <li>1. Overview on funding for 2022</li> <li>2. Report on 2022 in-person meeting of the IARU Gender Group's Senior Officers</li> <li>3. Funding request for 2023</li> </ol> <p>The Gender Group met in person in August 2022 at the University of Copenhagen. The agenda: updates from each institution on current gender equity efforts; strategic planning – how institutions are planning for the future with attention to gender equity; what does science tell us about equity training and programs that succeed or fail; how institutions address gender-based harassment and bullying; the effect of the pandemic on women's research productivity and how our various institutions have been addressing this.</p>
<b>Funding to date</b>	<p><i>USD 8,000 Meeting (2022 – carried over from 2021)</i></p> <p>---</p> <p>USD 8,000 Workshop (2020)</p> <p>USD 6,500 Workshop (September 2019)</p> <p>USD 6,575 Workshop (September 2018)</p> <p>USD 4,000 IARU Intern for data collection and analysis of gender differences in educational achievements (ETH)</p> <p>USD 4,000 IARU Intern to assess role of incentives (ANU)</p> <p>USD 8,000 Workshop (March 2017)</p> <p>USD 4,000 IARU Intern to assess the role of implicit bias training (Yale)</p> <p>USD 3,011 Workshop (July 2016)</p> <p>USD 5,200 Workshop (June 2015)</p> <p>USD 3,638 Workshop (2013)</p> <p>USD 6,512 Workshop (March 2012)</p> <p>USD 8,500 For project development (PM2006)</p>
<b>Outcomes of previous meetings</b>	<p><b>Senior Officers' Meeting, October 2021</b></p> <p>The Senior Officers approved the request to carry over the funding for the Gender Group meeting in 2021 to 2022 (USD 8,000).</p> <p><b>Senior Officers' Meeting, October 2020</b></p> <p>The Gender Group held an online meeting attended by seven IARU universities. In the meeting, they shared each institution's initiatives on diversity, discussed impacts of COVID-19 on conditions for women in research, and reported how they have been handling protest movements related to "Black Lives Matter". Karen Kennedy (Cambridge) added that while the group has been trying to set a common goal, they have not been</p>

able to do so and she expects the group to set goals in the coming meetings. Senior Officers approved the request of carryover.

### **Senior Officers' Meeting, September 2019**

Jürg Brunnschweiler (ETH Zürich) pointed out that critical issues of Gender Group including the group's name and focus remained unresolved. Equally, as discussed in SOM 2018, Senior Officers considered the agenda of the group's annual meeting scheduled to be held on 25-27 September to be too broad and casted doubt on the meaning of broadening the scope of activities from 'Gender' to 'Equity, Diversity, Inclusion (EDI)'.

*[Excerpt from SOM 2018 outcomes]*

*Senior Officers agreed that terms like "inclusion" and "equity" are broad and may carry different weights at each IARU university, so Senior Officers suggest this initiative maintain its focus on gender specifically. This can include—but is not limited to—sexual violence and harassment and how these are addressed on university campuses, family policies, and intersectionality within gender issues.*

Jürg Brunnschweiler referred to the difficulty in grasping the group's current situation due to lack of efficient information sharing. It was suggested that adding member lists of each activity carried out will be helpful to increase the visibility of the Gender Group. This might go with other initiatives as well. Senior Officers came to the conclusion that the approval or refusal of USD 7,000 funding request for 2020 meeting depends on outcomes of the group's annual meeting held on 25-27 September 2019.

### **Takeaways:**

Senior Officers requested that Gender Group submit outcomes of their annual meeting. The report needs to include the following items:

- Attendee list
- What the group has achieved so far
- What was discussed and "decided" at the meeting
- A clear outline of where the group sees itself going
- How the group plans to achieve these goals
- The purpose of holding 2020 meeting (draft agenda)

It is also required for Gender Group members to share information about group's activities with Senior Officers more frequently. The Secretariat regularly shares member lists of all IARU initiatives at least before PM and SOM.

\*Note

The outcomes of the 2019 annual group meeting submitted by the Group leads were circulated to Senior Officers via email in



	November 2019, and USD 8,000 was approved for 2020 annual meeting at Copenhagen.
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## Gender Group 2022 Summary

### Gender Group Meeting, August 22-24, 2022.

The University of Copenhagen hosted the meeting. This was the group's first meeting in person since 2019 due to the pandemic. Ten of our eleven institutions participated (Berkeley was absent), some with two attendees. Representatives from seven institutions attended in person and representatives from three institutions participated via Zoom. Institutions with in-person representation: ANU, Copenhagen, ETH, NUS, Oxford, Tokyo, and Yale. Institutions with Zoom-based participation: Cambridge, Cape Town, and Peking. There were two participants from ANU, Copenhagen, Tokyo, and Cape Town. The meeting agenda included updates from each institution on current gender equity efforts; strategic planning – how institutions are planning for the future with attention to gender equity; what does science tell us about equity training and programs that succeed or fail; how institutions address gender-based harassment and bullying; the effect of the pandemic on women's research productivity and how our various institutions have been addressing this.

Attendees approved a proposal from the representative of the National University of Singapore to host the next Gender Group meeting in summer 2023 on the NUS campus. This proposal awaits formal approval of NUS. Attendees also agreed that we should request USD 8,000 from the IARU Senior Officers for 2023 meeting.

#### Attendee list:

ANU: Fiona Jenkins, Meredith Nash

Cambridge: Sarah Colvin (via Zoom)

ETH Zurich: Raphaella Hettlage

NUS: Eric Thompson

PKU: Ran Zhang (via Zoom)

Oxford: Adrienne Hopkins

UCT: Sianne Alves, Ameeta Jaga (both via Zoom)

U Copenhagen: Jacob Graff Nielsen, Ingrid Skovsmose Jensen

U Tokyo: Takane Ito, Mariko Ogawa

Yale: Karen Lee Anderson (Lead)

### Gender Group virtual meeting March 2022

A meeting was held on 03 March 2022 and the discussion focussed on:

#### 1. Meeting in-person at the University of Copenhagen in 2022

The majority of attendees said they would like to meet in person and would attend if the timing works for them. Two attendees noted differing reasons why they would not be able to attend: in one case, the country does not currently allow international travel, and in the other case, the staffing of the relevant gender-focused role is in flux. These two said they would like to participate virtually if possible. discussed dates and narrowed the timeframe to late August, most likely August 22-24, 2022.

#### 2. Topics to prioritize for the in-person meeting

We agreed on these topics, in this order of priority:

- a. Gender equity planning: developing and implementing strategic plans or action plans to enhance gender equity.
- b. Plans to prevent and respond to sexual harassment and gender-based harassment.
- c. The effect of the COVID pandemic on women's research productivity, and how to support the productivity in order to advance women's career progress.

## Gender Group 2021 Summary

The Gender Group's agenda for 2021 was to learn from each other about how to develop gender equity plans (with note to the Horizon Europe funding platform requirements), how to understand and respond to gender disparities in research productivity during COVID – especially in terms of the compounding effects that will emerge in a few years from now – and discussions on sexual harassment, intersectionality, LGBTQ+ issues and gender equality in a post-COVID world.

Our group's own activities have all been virtual due to the pandemic, and our meetings have been productive and lively. The pandemic reminds us of how much our institutions have in common, even if we also have significant differences.

Regarding our activities: The most significant effect of the pandemic is our need to defer our in-person meeting twice. We had planned to meet at the University of Copenhagen in June 2020, but this had to be postponed due to the pandemic. We continue to be hopeful that we might hold this meeting in person in Copenhagen in June 2022. The University continues to wish to host it, if health conditions allow.

Regarding funding: We have so far not had, and expect not to have, any expenses in 2021. We ask to carry over the budget allocation for the meeting at the University of Copenhagen June 2022 with the hope that we will be able to hold it.

The Gender Group's Senior Officers have had two virtual meetings in 2021, with plans to meet again in December 2021. These meetings were convened by Yale University (Karen Anderson).

## Funding Request Form

### Project Name/Year:

Annual Conference at National University of Singapore in 2023

### Total Requested Amount & Breakdowns:

Item	Amount
Conference fee	USD 8,000
<b>Total Requested Amount</b>	<b>USD 8,000</b>

\*Please note that it is required to report how the approved funding is actually used and the outcomes later in the annual status report.

### Other Financial Resources (if applicable):

N/A

### Participants List (Please specify the lead by adding "Lead" next to the name):

University	Title/Position	Name
ANU	Professor and Director, ANU Gender Institute	Fiona Jenkins
	Associate Dean, College of Engineering & Computer Science	Meredith Nash
ETH Zurich	Leader, ETH Diversity Office	Raphaela Hettlage
NUS	Associate Professor of Sociology & Anthropology	Eric Thompson
PKU	Associate Professor, Graduate School of Education	Ran Zhang
Berkeley	Special Faculty Advisor to the Chancellor on Sexual Violence and Sexual Harassment; Associate Vice Provost for the Faculty	Sharon Inkelas
Cambridge	Schröder Professor of German & University Gender Equality Champion	Sarah Colvin
UCT	Director, Inclusivity & Change, Office of the Deputy Vice Chancellor	Sianne Alves
Copenhagen	Dean, Faculty of Law	Jacob Graff Nielsen
Oxford	Head of Equality and Diversity	Adrienne Hopkins
UTokyo	Vice President for Diversity Education	Takane Ito
Yale	Associate Provost for Academic Resources and Faculty Development	Karen L. Anderson (Lead)

\*The list does not need to be complete in case not all participants are confirmed yet.

**Details of the Project (background, purpose, expected outcomes, schedule, project's continuity, etc.):**

We are planning – subject to your budget approval and final approval by NUS – to hold our 2023 annual meeting at the National University of Singapore during the last week of June 2023. All 10 of the Universities in attendance at our 2022 meeting at the University of Copenhagen expressed enthusiasm for attending this 2023 meeting. The topics for the 2023 meeting, as agreed on during the 2022 meeting, will include:

1. The latest social science research on which gender equity practices (training, workshops, grievance processes) are most and least effective according to data-centered studies.
2. Intersectionality and gender: how do differing backgrounds (parental status, social background, economic status, having a partner/spouse, etc.) relate to gendered outcomes for faculty career success? How should university leadership consider these issues when addressing gender, equity, inclusion, and belonging? What data (about our students and staff) do we collect and report on that helps us understand these issues?
3. Gendered infrastructure: how can physical and organizational structures enhance gender, equity, inclusion, and belonging? What are the best practices relating to childcare facilities, lactation rooms, gendered lavatories, parental leave time, etc.?
4. The effect of the pandemic on women's research productivity and how our various institutions have been addressing this
5. How do our different universities structure their staff positions that focus on gender, equity, inclusion, and belonging?

Our normal meeting pattern is to meet over three days: day 1, late afternoon and evening gathering; day 2, full day of meetings with dinner together; day 3: meetings all morning through lunch. Our 2022 meeting in Copenhagen included representatives from 10 of 11 IARU universities. Of these, three universities attended via Zoom, and this was highly successful. We plan to offer the option of attending via Zoom in the future. Those who attended via Zoom would have preferred to attend in person but could not for structural reasons.

## 7.4 Global Transformation (GT) initiative

<b>Lead</b>	UC Berkeley and UCPH 2021-2022 / UCPH and UCT 2022-2023
<b>Reporting</b>	<i>Dr. Bjarke Oxlund (UCPH), Dr. Khatharya Um (UC Berkeley), Dr. Andreas Egelund Christensen (UCPH)</i>
<b>Executive summary</b>	<p>The GT group remained active during the past year, despite the fact that the group could not offer its “Signature activity”, the <i>Borderland</i> summer school programme in Chiang Mai, Thailand in 2020, 2021 and 2022 due to the global COVID-19 pandemic.</p> <p>Currently, the GT group is exploring the possibility of offering the summer course in 2023, again in collaboration with Chiang Mai University, Thailand, where the course will be held.</p> <p>In view of the course cancellations (2020-2022) and uncertainties about the pandemic, the GT group held virtual meetings on April 9, 2021, and January 4, 2022, and finally a most welcomed physical meeting on July 12-14, 2022, hosted by NUS in Singapore, to discuss among other things the future of GT, decide on a leadership rotation, and explore additional GT activities for 2022 and onwards.</p> <p>The main outcomes of the meetings were:</p> <ol style="list-style-type: none"> <li>1) the decision to maintain the governing structure of the working group including a chair, vice-chair and a secretary.</li> <li>2) the decision of a leadership rotation, where UCPH is taking over the role as chair from UC Berkeley. UCT takes on the position as vice-chair. The secretary remains at UCPH by Dr. Andreas Egelund Christensen.</li> <li>3) the decision to offer the <i>Borderland</i> summer school programme in July 2023.</li> <li>4) the decision to develop a new IARU Webinar format titled ‘<i>IARU in Conversation</i>’ addressing key issues of 21<sup>st</sup> Century challenges of Global Transformation.</li> <li>5) the decision to support a new seminar series hosted by UCPH, titled ‘<i>Africa and Asia: Optimism</i>’, building on the IARU Roundtable discussion held at the conference ‘<i>Asia and Africa in Transition</i>’ at UCPH in 2021.</li> <li>6) the decision to draft a joint publication either based on the experiences and contributions from the <i>Borderland</i> course and/or the new webinar series ‘<i>IARU in Conversation</i>’.</li> <li>7) the decision to explore the possibility for integrating parts of the new Global Migration initiative by University of Oxford to the <i>Borderland</i> summer school programme.</li> </ol>

	<p>8) a strong wish from the GT group to be more visible at the IARU webpage including a revised vision and mission statement of the GT initiative.</p> <p>The GT group aims to meet physically for an annual meeting as well as 2-3 online meetings over the next year to plan and execute the many planned activities.</p>																		
<b>Items for decision</b>	<p>The GT group requests funds for activities in 2022-2023 (USD 28,000) to make the following activities possible:</p> <p>a) resume the <i>Borderland</i> summer school programme in 2023.</p> <p>b) develop and implement several new activities and formats for the IARU GT initiative (see meeting outcomes above).</p> <p>c) hold an annual in-person GT meeting at one of our IARU partner universities.</p> <p>d) carry over USD 2,000 in unspent funds from the 2022 meeting at NUS to supplement funding for the Borderlands course.</p>																		
<b>Funding to date</b>	<table border="0"> <tr> <td>USD 13,500 (GSP 2020)</td> <td>GT Summer Field Course</td> </tr> <tr> <td>USD 10,000 (GSP 2018)</td> <td>GT Summer Field Course</td> </tr> <tr> <td>and GT annual meeting</td> <td></td> </tr> <tr> <td>USD 4,029 (May 2018) (Cambridge)</td> <td>4th GT Workshop</td> </tr> <tr> <td>USD 2,000 (GSP 2018)</td> <td>GT-GSP course reserve</td> </tr> <tr> <td>USD 10,000 (May 2017)</td> <td>3rd GT Workshop (PKU)</td> </tr> <tr> <td>USD 5,000 (May 2016) fee</td> <td>“Going Global” Speaker</td> </tr> <tr> <td>USD 6,255 (May 2016)</td> <td>2nd GT Workshop (UCT)</td> </tr> <tr> <td>USD 3,300 (May 2015) Zurich)</td> <td>1st GT Workshop (ETH</td> </tr> </table>	USD 13,500 (GSP 2020)	GT Summer Field Course	USD 10,000 (GSP 2018)	GT Summer Field Course	and GT annual meeting		USD 4,029 (May 2018) (Cambridge)	4th GT Workshop	USD 2,000 (GSP 2018)	GT-GSP course reserve	USD 10,000 (May 2017)	3rd GT Workshop (PKU)	USD 5,000 (May 2016) fee	“Going Global” Speaker	USD 6,255 (May 2016)	2nd GT Workshop (UCT)	USD 3,300 (May 2015) Zurich)	1st GT Workshop (ETH
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<b>Outcomes of previous meetings</b>	<p><b>Senior Officers' Meeting, October 2021</b></p> <p>The group requested USD 13,500 for next year (USD 10,000 for the Borderlands' Field Course in Chiang Mai University, Thailand, with the remainder going to the group meeting).</p> <p>This request had previously been approved for 2020. The funds were, however, not used due to COVID and they were not carried over to 2021. The request was therefore presented as a new request to the Senior Officers. The Senior Officers approved this request.</p>																		

The Global Transformation Group was hopeful that they would be able to run the course in 2022, though it would remain contingent on the international situation.

### **Senior Officers' Meeting, October 2020**

Due to the global pandemic, GT group was unable to offer the 2020 summer course in Chiang Mai. The group is exploring the possibility of cancelling GT course in summer 2021 as well, in addition to discussing possible future activities and initiatives. The GT executive team had discussed a few concrete activities such as the Graduate Student workshops.

### **Senior Officers' Meeting, September 2019**

Patricia Heuberger (ETH Zürich), a member of the Global Transformation (GT) Group, reported the groups' activities in 2019. Based on Senior Officers' recommendations in SOM 2018, the GT Group decided to place a summer field course at Chiang Mai University, Thailand as the centre of their activities. At the second year of the summer school, either students or faculty from all the eleven IARU partners and Chiang Mai University engaged in the program. After students were exposed to various lectures for one week, they were provided with opportunities to apply the gained knowledge to field study, 14 research projects with local NGOs and villages.

Patricia Heuberger introduced a GT student-led initiative, which was derived from the GT summer course. This summer two Berkeley students who participated in the 2018 courses developed a student-centred online platform (<https://www.iarustudents.com/>) to promote exchange among IARU students. Moreover, the GT Group is considering extending the summer field courses to Global South areas.

Senior Officers unanimously appreciated the value of the GT Group activities; however, the following concerns were pointed out:

- It is unclear how the requested funding of USD 10,000 will be used in detail.
- The GT summer course is expensive as it needs to support students travel from all around the world. Overall, costs should be clarified in order to judge whether the USD 10,000 support is sufficient or not.
- The administrative burden heavily depends on two faculty members from Berkeley and Copenhagen.

Senior Officers expressed understanding for the necessity of holding the summer course every year to keep up the momentum. They, however, came to the conclusion that at this point it is

difficult to approve a funding request of USD 30,000 for the next three years.

Takeaways:

Senior Officers requested the GT Group to resubmit their future plan to explain how to manage their group activities sustainably at their earliest convenience. It should contain:

- overall budget of GT Group projects, a detailed breakdown of the requested funds, how the requested funding is located in the whole system,
- and how to streamline the management of the summer field course. The report will be circulated to Senior Officers to determine whether IARU funding will be granted to the GT Group's 2020 activities.

\*Note

The follow-up report, the whole picture of GT group's 2020 budget, and a list of participants from member universities was circulated to Senior Officers via email in January 2020. Senior Officers approved the funding request for 2020 activities, USD 13,500 as follows.

- USD 5000 for student stipends
- USD 5000 to cover local course related
- USD 3,500 for GT Planning Meeting at NUS

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**Senior Officers' Meeting, September 2018**

Rexille Uy (IARU Secretariat) reported that last year the Global Transformation lead transferred from ETH Zürich to UC Berkeley. GT is now led by Professor Khatharya Um. In the past year, GT dedicated its activities to address the principal concerns about the group that came out of the 2017 SOM. The group drafted a vision and mission statement, and in response to the Senior Officers' request for a clear understanding of its program activities, GT developed an action plan with accompanying rationale.

Since the 2017 feedback from the Senior Officers, GT developed a coherent and tangible plan of activities for 2018-19 and completed the GT-GSP Summer Field Research Course in Chiang Mai, Thailand. In 2018, GT collaborated with the IARU Sustainability Group on various activities, including a panel at the International Sustainable Campus Network conference in Stockholm, a teach-in at UC Berkeley on issues related to the SDGs, and an IARU-wide, student-led virtual forum on SDGs which is currently being built. This forum will build on the constituencies and concerns from the Stockholm conference and the summer course in Chiang Mai.

A video about the GT-GSP Summer Course in Chiang Mai was shown to the Senior Officers. Rexille Uy (IARU Secretariat) reported that the first run of the course went very well. GT submitted a funding request for Senior Officer approval of USD 2,000 to run a second year of the course, as well as an additional USD 8,000 for other programmatic activities in 2019.

Søren Nedergaard (UCPH) reported that the GT-GSP coordinator and professor involved from UCPH, Andreas Egelund Christensen, was pleased with the field course. Søren Nedergaard noted that the funds being requested to run the course are much less than the resources and time it cost UCPH staff to develop the course for 2018. Stephen Davison (Cambridge) attended the GT meeting in Cambridge and expressed concern about the sustainability of running this labour-intensive course without additional support. It was reported that setting up the internships and NGO contacts for this course took several trips to Thailand, taking a toll on the course instructors.

Senior Officers wholeheartedly supported the course and the experience it provided students but did not agree with linking it to larger global transformation challenges and SDGs. The GT initiative should be treated as one course that is worth supporting, without making a leap to challenging the way the Global South is studied. Senior Officers agreed that the significance of the course lies in undergraduates being exposed to NGOs and research on the ground.

Takeaways:

Senior Officers agreed that the broad mission of the GT still lacks clarity, although some proposed activities for 2019 have a clear direction. Senior Officers remain unsure as to who at their universities should be involved with GT.

Senior Officers suggested that GT spend its efforts and resources on the field course.

Senior Officers approved the USD 10,000 funding request for GT, with the stipulation that the entire amount be used only towards running a successful field course in Chiang Mai for 2019. The USD 10,000 should be used towards instructor travel to set up NGO and field meetings, student fellowships, and any meetings specific to a discussion of the course.

## Funding Request Form (Carryover request and new requests)

### Carryover Request: Redirecting unspent funds from 2022 meeting

#### Total Requested Amount & Breakdowns:

Item	Amount
Unspent funds from 2022 meeting to be redirected to 2023 Borderlands course	USD 2,000
<b>Total Carryover Amount</b>	<b>USD 2,000</b>

#### Details of the Project (background, purpose, expected outcomes, schedule, project's continuity, etc.):

Much of the Borderlands course funding goes towards student scholarships and in the past, the University of Copenhagen has managed to secure external grants to assist with funding the course, although this source of funding is not guaranteed.

The Global Transformation group has USD 2,000 of unspent funds from its 2022 meeting at NUS and would like to redirect this amount towards the 2023 relaunch of the Borderlands course.

## New Funding Request

**Project Name/Year:** Global Transformation (GT) initiative / 2022-2023

### **Total Requested Amount & Breakdowns:**

Item	Amount
Item 1: IARU Borderland Summer School 2023	USD 20,000
Item 2: IARU Global Transformation Publication 2023	USD 3,000
Item 3: IARU Global Transformation Annual Delegates Meeting 2023	USD 5,000
<b>Total Requested Amount</b>	<b>USD 28,000</b>

\*Please note that it is required to report how the approved funding is actually used and the outcomes later in the annual status report.

### **Other Financial Resources (if applicable):**

Please see complete budget below. The overall GT budget does not include in-kind contributions of faculty and institutions that have been important in the past (e.g., course preparation, planning of meetings, onsite faculty preparation, development of graduate teaching opportunities).

### **Participants List (Please specify the lead by adding “Lead” next to the name):**

University	Title/Position	Name
ANU	-	
ETH Zurich	Professor	Harald Fischer-Tine
	Senior Programme Manager	Patricia Heuberger
NUS	Professor	Maitrii Aung-Thwin
PKU	Professor	Tianyang Xi
Berkeley	Associate Professor	Khatharya Um
Cambridge	-	-
UCT	Professor	Frank Matose – lead – Vice-chair of GT
Copenhagen	Professor/Head of Department	Bjarke Oxlund – lead – Chair of GT
	Dr./Chief Consultant	Andreas Egelund Christensen – lead – Secretary of GT and responsible for the Borderland Summer School
Oxford	Professor	Alexander Betts

	Chief Operating Officer	Merolyn Whitaker
<b>UTokyo</b>	Professor	Yuto Kitamura
<b>Yale</b>	Professor	Helen Siu
<b>Yale University-NUS College</b>	Associate Director	Zhana Sandeva

\*The list does not need to be complete in case not all participants are confirmed yet.

**Details of the Project (background, purpose, expected outcomes, schedule, project's continuity, etc.):**

**Re. Item 1: IARU Borderland Summer School 2023**

The Summer School "*Borderland: Critical Approaches to Field Research in the Global South*" is the "signature activity" of the Global Transformation initiative. It offers four weeks programme in Chiang Mai, Thailand in close collaboration with Chiang Mai University.

The Borderland Summer School is designed to provide students with an opportunity to think critically about the research process, epistemologies, and ethics in the conduct of research. It focuses on the *research process* rather than the mastery of a specific topic or method, with the aim of providing students with the tools to raise and address critical questions in their own research and establish a foundation from which they can apply the knowledge and practices from the course to future projects.

The course combines classroom learning with meaningful interactions and placement with local NGOs on ongoing projects in and around Chiang Mai in northern Thailand. Through this placement, students will have the opportunity to engage with critical research, issues, and policies related to the themes of the course as well as communities and institutions impacted by, and working on, these issues through research, policy formulation, community program development, and/or advocacy. Drawing upon insights from these different forms of field engagement, they will reflect on the research implications, and develop a succinct research proposal.

The Borderland Summer School began in summer 2018 at Chiang Mai University, Thailand. Due to the Covid-19 pandemic, it could not be offered in 2020, 2021 and 2022. The last time it was offered was in 2019, with participation of staff, faculty and students that combined representation from all eleven IARU universities.

GT has committed towards Chiang Mai University to offering the course for five years. Given the cancellation of the course in 2020, 2021 and 2022, we envision offering the course for three more years. We plan to offer it in 2023 again.

The past two editions (2018 and 2019) were heavily subsidised by the UCPH. This led to a somewhat imbalanced student body with the majority of students coming from UCPH. We request USD 10,000 to increase student participation from other IARU universities through stipends and USD 10,000 to contribute to the running costs of the summer school including a preparation mission and local overhead at Chiang Mai University. The bulk of the running costs are covered through participation tuition fees.

**Additional Detail for Budget Request of USD 20,000**

- USD 10,000 for Student Scholarships

In developing the course, we are fully cognizant of the need to make it as cost effective as is possible for students. In essence, based on 2019 data, we are providing a month-long intensive field experience for

40 students for which they receive 7.5 ECTS credits at the cost of USD 980.175 per student. This is, by far, one of the most economical, credit bearing travel study courses offered by IARU institutions.

**That being said, the cost borne by students is uneven, with non-EU students paying a much higher fee.** Unless, additional institutional support can be secured, the course will continue to reflect a grave imbalance in student participation.

Should the funding situation for the course become more robust in the future, we would consider increasing the allocation for student support, in terms of either the number or the size of the scholarships, or both. The provision of student support is important to ensure student diversity within and across IARU institutions.

We request USD 10,000 for 10 student stipends to increase the participation of non-EU students.

- USD 10,000 for Borderlands summer school onsite coordination and logistical expenditures

Expenses include:

- room and facility rental
- translators
- transportation of students to field sites and to local NGOs
- field excursions
- welcome reception
- farewell dinner
- student public forum

### Full Borderlands Course Budget

Given our commitment to stay in Chiang Mai for a total of 5 years, it is likely that even with the anticipated change in course co-conveners, the budget items will remain essentially the same.

Income			
Item	USD	Details	Comments
Student fees	28,700	20 x 675 + 7 x 1,790 + 3 x 895	Estimated 30 paying students with different tuition fee - not included 4 CMU students with waived fees.
UCPH IARU Grant	10,000		Not confirmed but was granted in 2020. To cover preparation trip for Dr. Andreas Egelund Christensen + general course expenditures.
IARU	20,000	10,000 + 10,000	Covering: 10,000 for course related expenses in Chiang Mai + 10,000 for student stipends.
<b>Total income</b>	<b>58,700</b>		

**Costs**

Institution	Item	USD	
Chiang Mai	Operational costs:	25,200	Including: speakers, student transport to NGOs, field trips, public forum, welcome reception, farewell dinner etc.
UCB	Operational costs	10,000	Including: Faculty travel, faculty teaching, accommodation in Chiang Mai.
UCPH	Operational costs	10,000	Including: Faculty travel, faculty teaching, accommodation in Chiang Mai.
	Preparation trip: January 2023	3,000	Including: Travel costs for preparation trip.
	Contingencies	500	E.g., extra rooms for sickness, representation etc.
IARU	Student stipends 10 x 1,000 USD	10,000	Eligible for full paying IARU students
<b>Total costs</b>		<b>58,700</b>	

**Re. Item 2: IARU Global Transformation Publication 2023**

A working group of IARU Global Transformation plans to write and publish an article or a volume on the challenges of the 21st century (Lead: Prof. Khatharya Um, UC Berkley, Prof. Frank Matose, UCT, Prof. Harald Fischer-Tiné, ETH Zurich). We request USD 3,000 for the publishing costs in an open access journal.

**Re. Item 3: IARU Global Transformation Annual Delegates Meeting 2023**

The IARU Global Transformation group witnesses a new and vibrant dynamic seven years after its inception. During the 2022 annual meeting at NUS, Singapore, new members joined the group, and a leadership rotation took place. The topic remains very relevant and timely, and all involved universities invest considerable in-kind and cash contributions to the manyfold activities of the GT initiative. An annual face-to-face meeting is absolutely instrumental in bringing the group members together, on-board new colleagues and institutions, revise existing activities and brainstorm on new activities. The pandemic break of two years without face-to-face meeting has shown how difficult it is to keep the spirit and dynamic in a IARU working group which runs several concrete and tangible activities, involving facility and administration members from several universities. Therefore, we kindly request USD 5,000 for organizing the 2023 annual GT meeting. This covers room rental rates, boarding and local transportation of the delegates. The host university has still to be identified.

**Additional Detail for Budget Request of USD 5,000**

Meeting costs for annual meeting 2023 (host to be identified):

- local logistics
- meeting rooms
- food: welcome dinner and lunches
- local transportation

All the proposed activities build on the experiences of the Borderland Field Research Course, are interrelated, and aligned with the educational mission of Global Transformation. Combined, they constitute a reinforcing and synergistic educational initiative that will deepen collaboration within and beyond the Alliance, and expand opportunities for our students, both graduate and undergraduate. Members of the GT working group have affirmed their commitment to this Activity Plan, as underscored by their willingness to take the lead on respective initiatives.

## 7.5 HR Consultation Group

<b>Lead</b>	<i>National University of Singapore</i>
<b>Reporting</b>	<i>Kevin Chua</i>
<b>Executive summary</b>	<p>The HR Consultation Group held 3 virtual meetings in 2021 and plans to hold 3 virtual meetings in 2022. The constituent Universities rotate and take turns to host these meetings. The five meetings have since been held.</p> <ol style="list-style-type: none"> <li>1. 22 February 2021 – hosted by the National University of Singapore on the theme of “COVID-19 and its impact to the University, and the HR response”</li> <li>2. 17 June 2021 – hosted by the University of Copenhagen on the theme of “Promotion and Tenure of Academic Staff”</li> <li>3. 20 October 2021 – hosted by Australian National University on the theme of “Workforce Planning and Leadership Development”.</li> <li>4. 17 March 2022 – hosted by University of Cape Town on the theme of “Post COVID for University as Organisations and Workplaces”</li> <li>5. 8 June 2022 – hosted by Australian National University on the theme of “How universities will remain competitive and attract and retain top talent in light of the future of work and flexibility offered by creative and innovative employers”</li> </ol>
<b>Funding to date</b>	
<b>Outcomes of previous meetings</b>	<p><b>Senior Officers’ Meeting, 2021</b></p> <p>The HR Consultation group made no budget request in 2021.</p> <p><b>Senior Officers’ Meeting, October 2020</b></p> <p>HR consultation Group had three meetings last year. New Chief People Officer at NUS has arrived and took over the role of lead for the group this October. The group will hold a virtual meeting before February 2021, aiming to reactivate the group activities. Li Ling Koh stated that she would like to update the contact list of the initiative and hopes each institution to inform NUS about HR personnel who is interested in joining the initiative.</p> <p><b>Takeaways</b></p> <p>NUS will share agenda with IARU member universities so that each university can recommend suitable HR personnel to the group.</p> <p><b>Senior Officers’ Meeting, September 2019</b></p> <p>Andrew Wee (NUS) updated attendees about the HR Consultation Group which was proposed in PM 2019. The first online meeting in April established the group’s fundamental framework. As the group</p>

	<p>handle confidential data, member universities must submit the “Data Sharing Agreement”, which seven out of eleven partners already signed. The group started a first survey for benchmarking studies, which five institutions completed as of SOM 2019. Items for the survey include general information such as student-faculty ratio and country-dependent information such as average monthly payroll.</p> <p>The first real meeting will be jointly held with the L3 Workshop held on 8-9 November 2019 at NUS. There was no funding request from the group.</p> <p><b>Presidents’ Meeting, January 2019</b></p> <p>Andrew Wee (NUS) presented a proposal focusing on HR consultation. This proposal is motivated by VP in HR at NUS, aiming to prepare a platform for HR VPs or directors to share practices that are unique to each country and university. This platform will be initially virtual and does not need any budget to run. Interested members will send the names and contact information to the Secretariat.</p>
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## HR Consulting Group

Due to the on-going COVID-19 situation in the world and the travel restrictions in many parts of the world in early 2022, the IARU HR Consultation Group does not plan to have any physical meetings in 2022.

The virtual meetings have been successful, and therefore most of our future meetings will also be virtual. Having said that, the HR Consultation Group acknowledges that in-person meetings have its place and we will be considering one in-person meeting for 2023.

Five meetings have been since been held in 2021 and 2022. One more meeting has been planned for October 2022. The details of the meetings that have taken place are as follows:

<b>Date</b>	<b>Host</b>	<b>Topic of Sharing</b>
22 February 2021	National University of Singapore	COVID-19 and its impact on the university, and the HR response.
17 June 2021	University of Copenhagen	Promotion and Tenure of Academic Staff.
20 October 2021	Australian National University	Workforce Planning and Leadership Development.
17 March 2022	University of Cape Town	Post COVID for University as Organisations and Workplaces
8 June 2022	Australian National University	How universities will remain competitive and attract and retain top talent in light of the future of work and flexibility offered by creative and innovative employers

## 7.6 Librarians' Contact Group

<b>Lead</b>	Australian National University
<b>Reporting</b>	Roxanne Missingham
<b>Executive summary</b>	<p>2022 continues to provide challenges for IARU member libraries. The pandemic is still affecting a number of universities.</p> <p>Activities this year:</p> <ul style="list-style-type: none"> <li>Continuing to provide support to the University of Cape Town Library after the fire that tragically destroyed key collections in April 2021.</li> <li>Launching the “IARU Libraries passport” designed to make the journey to libraries and their collections more transparent and valuable for physical and virtual visitors from other IARU institution, further information available at <a href="https://library-admin.anu.edu.au/iaru-passport/">https://library-admin.anu.edu.au/iaru-passport/</a>;</li> <li>the Libraries Exchange program;</li> <li>creating a stronger network through discussions;</li> <li>Planning for meetings in 2022 and 2023.</li> </ul>
<b>Funding to date</b>	<p>USD 10,000                      <i>Staff Exchange Program (2021)</i></p> <p>---</p> <p>USD 10,000                      Staff Exchange Program (2020)</p>
<b>Outcomes of previous meetings</b>	<p><b>Senior Officers' Meeting, October 2021</b></p> <p>The Senior Officers approved the request to carry over funding for the Staff Exchange Program from 2021 into 2022. Some of the group's activities this year include the annual update on benchmarking data, providing support to the University of Cape Town Library after the tragic fire; producing a guide to the services available from all members' libraries during the period when universities could only offer limited physical access to campuses because of COVID-19 (see the IARU <a href="#">website</a>); work on the “IARU Libraries passport”. An article entitled 'Sustainable Development Goals: Insights from Research Libraries' was published in <i>The International Journal of Librarianship</i> which reported of the activities of IARU libraries in implementing the UNSDGs (attached to report); and communications/networking through online means.</p> <p><b>Senior Officers' Meeting, October 2020</b></p> <p>Some of the group's activities this year include the annual update on benchmarking data, the creation of a webpage that contains the information about services available from IARU libraries during COVID-19, and update on “IARU Passport” that will help students and academics of IARU members access the collections and services of IARU libraries. Their pilot program of staff exchange was cancelled due to the travel restriction. There was no funding request.</p>

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## Librarians' Contact Group

In 2022 IARU libraries are re-energizing their services, workforces and collaborative efforts. We are establishing new ways to evolve our services and approach, particularly in relation to staffing benefits, with the benefit of the global vision that comes from working as an international group.

### **Cape Town Support**

The tragic fire at the University of Cape Town that destroyed a significant archive collection and part of the library collection. Members continue to offer support in a practical way, for example, by supporting the digitization of relevant collection material. At this stage support is being offered for the very complex issues raised through the insurance claim process.

### **Support for IARU scholars and students during COVID-19**

The IARU Librarians' Contact Group has continued to provide access to collection material for other IARU libraries to support education and research. Activities to digitize collections and enhance access continue.

### **Benchmarking**

The benchmarking report for 2020 was completed and the Group has agreed to pause further activity until we review the program at our next face to face meeting (planned for December 2022).

### **IARU Libraries Passport**

The IARU Libraries passport has now been launched. It is designed to make the journey to libraries and their collections more transparent and valuable for physical and virtual visitors from other IARU institutions. Additional information can be found at <https://library-admin.anu.edu.au/iaru-passport/>.

### **Reactivating the Libraries Exchange program**

This initiative was paused during the pandemic as travel was not possible. It is being reactivated with hope for exchanges to occur in 2023.

### **Communication and Sharing Information**

A meeting of the group was held on 12 July, with participation by around half of the members. While it was difficult to find a time that would suit, it provided an opportunity to reactivate the group.

Key areas discussed:

- Plans for a face-to-face meeting at ETH Zürich in December 2022, and future meetings in Singapore and Cape Town in 2023 and 2024 respectively. Topics identified for discussion at the ETH meeting included:
  - Global perspectives of contribution and change in our libraries
  - Value and nature of IARU libraries – what are our qualities/what defines us
  - Rethinking space – how students have reshaped their use of space during and post lockdown and how we need to rework spaces to support students as community members

- Potential for promotion videos/program around IARU libraries and our roles as research infrastructure and the value of our services and collections
- Promotion of the IARU libraries passport, including work on a template for a letter of introduction for academics and students who are visiting other IARU libraries.
- Other discussions including: working from home, the impact on the identity of an institutional library, building and growing teams in this new environment, mainstreaming virtual services, reengaging through face to face services, organisational culture.

### **Summary and Future Activities**

In terms of overall activities, the IARU Group provides member libraries with an invaluable opportunity to think globally about issues. The group continues to be in communication and is keen to revitalize with a face-to-face meeting in December this year.

## Funding Request Form (Carryover Request)

### Project Name/Year:

Staff exchange program 2023

### Total Requested Amount & Breakdowns:

Item	Amount
Pilot Staff Exchange Program 2023 each participant will receive up to USD 2,500 to cover costs of travel to the institution and other essential costs	USD 10,000
<b>Total Requested Amount</b>	<b>USD 10,000</b>

\*Please note that it is required to report how the approved funding is actually used and the outcomes later in the annual status report.

### Other Financial Resources (if applicable):

### Participants List (Please specify the lead by adding "Lead" next to the name):

To be determined

University	Title/Position	Name
ANU	University Librarian (Chief Scholarly Information Officer)	Roxanne Missingham (Lead)
ETH Zurich	Director of the ETH Library	Rafael Ball
NUS	University Librarian	Natalie Pang Lee San
PKU	University Librarian	Jianlong Chen
Berkeley	University Librarian/Chief Digital Officer	Jeffrey Mackie-Mason
Cambridge	Director of Library Services/University Librarian	Jessica Gardner
UCT	Executive Director of Libraries	Ujala Satgoor
Copenhagen	University Librarian	Kira Stine Hansen
Oxford	Bodley's Librarian	Richard Ovenden
	Executive Assistant to the Vice-Chancellor	Rosemary Rey
UTokyo	Professor, Graduate School of Humanities and Sociology	Sumihiko Kumano
Yale	University Librarian/ Deputy Provost for Collections and Scholarly Communication	Barbara Rockenbach

\*The list does not need to be complete in case not all participants are confirmed yet.

### Details of the Project (background, purpose, expected outcomes, schedule, project's continuity, etc.):

## Pilot Staff Exchange Programme 2023

**Aim:** to develop a lightweight staff development, exchange and mentoring network allowing bilateral and multilateral exchanges between the member libraries and to share learnings from these visits.

### The Purpose of IARU and Libraries Contact group

The members of IARU have a shared global vision and values and are committed to educating future world leaders with an emphasis on academic diversity and international collaboration.

IARU's vision is to:

- Address the major challenges of our time
- Add value by providing opportunities to students and staff that would not arise otherwise
- Promote institutional joint working

The Libraries Contact Group is one of many collaborations between IARU Universities. The group meets to discuss the major issues facing libraries today. Shared topics of interest include library and resource discovery systems, services to readers and researchers, altmetrics and user studies, e-books and MOOCs.

At present there is no specific programme for staff exchange in place.

### Purpose and Benefits of the IARU Libraries Exchange Scheme

The IARU Exchange Scheme is an opportunity for staff to:

- Pick up new ideas and innovations and gain a wider perspective by finding out what others are doing in specific areas or new developments
- Gain an understanding of how other libraries are run and learn from others
- Share ideas, knowledge and learning with colleagues during the exchange
- Share ideas about good or best practice
- Develop contacts and networks with international colleagues
- Report back to colleagues at the home institution and to others within IARU
- Deepen their knowledge of other IARU University libraries and the cultural context in which they operate

### Who

Staff who want to take part in the scheme are likely to be:

- A specialist in a specific area, e.g. scholarly communications and therefore the most 'relevant' person to attend, and/or
- At 'middle management' level or someone who possibly has responsibility for leading a team or service, but doesn't necessarily need to be a manager

They will:

- Have enough expertise to enable them to get the most out of the visit and also pass on knowledge and learning
- Have a commitment to the library or other relevant profession and either have the appropriate qualifications or are working towards them.
- Have a role where they do not normally undertake international travel

### **Length of Time**

We would recommend a visit to be between a minimum of 1 or 2 days and up to a maximum of 2 weeks depending on the location and topics to be covered. Distance and the objectives for the exchange will have a bearing on the number of days the staff member is away. For example, a visit to somewhere close by to find out about a specific topic may take 2-3 days whereas a visit further afield that involves talking to a range of people and doing some research for a project or possibly involve some hands-on experience could take much longer.

Busy times of year should be avoided, such as the start of the academic year, examination time etc. and flexibility will be allowed for individual institutions to enable differences in time tables etc.

### **Exchange Scheme Timetable**

TBA

### **Topics**

A number of topics could be the subject of an exchange visit. They may include: the impact of technologies and digital trends; subject specific topics, e.g. digital humanities; scholarly communications; open access; systems; education/support; projects; strategic plans; library space; special collections and archives; public engagement; Research Data Management; cooperative collection development; understanding other collections; user experience; assessment; readers or reader services.

We would also like all participating university libraries to write a host profile which includes:

- A short description of their library
- A description of their current strategic focus
- A description of the library's strengths or areas they are a leader in
- A description of the areas they would be happy to cover if they hosted a visit from another IARU University.
- What kind of exchanges they can accommodate (length, accommodation, etc.)

This will enable applicants to make a judgement about where they can visit in order to fulfil their objectives.

### **Funding**

The visiting institution covers the costs of accommodation, travel and subsistence whilst the person is on the exchange. The person will be doing the exchange in work time and paid during for their normal working time whilst there. Any extracurricular activities will be paid for by the staff member from their own funds.

Funds will be available of up to USD2,500 per participant to cover costs of travel to the institution and other essential costs to commence the exchange program.

### **How will the pilot work?**

In the pilot we will organise 4 exchanges within IARU. Participating organisations will be asked to provide a profile (mentioned above) that will be shared on the IARU website.

Staff will be asked to apply for a visit to a university and will need to outline:

- The focus of the visit and objectives
- How it will benefit them
- How it will benefit the workplace
- How it will benefit the hosting organisation
- Their preference of hosting institution and why
- What they intend to bring back from the visit
- How they plan to report back and disseminate their findings/knowledge

The applications will then be sent on to the hosting organisation for them to make a decision about the best match for the exchange.

If staff are successful they will be encouraged to develop a virtual connection with the hosting organisation to develop a relationship, talk about objectives and develop a time table and make arrangements for the visit.

## **Guidelines**

### **General**

- Prior to the visit staff must connect virtually to meet and also talk through objectives and plan the visit.
- The exchange scheme will operate in English as the shared language of participants unless staff involved have a good working knowledge of the hosting country's language.
- The exchange will work on the basis of 1 person visiting another library rather than a group of people doing the visit.
- The learning will be reciprocal between the visiting staff member and host organisation.
- Staff involved in the exchange need to be established in post for at least a year in order that they have enough knowledge and expertise to pass on.
- Staff wishing to post on social media during their visit must check with the hosting organisation and follow the usual social media rules
- Template questions to guide people when they are on an exchange will be created
- A template time table to help hosting organisations manage the visit will be created
- A template report will be created to enable staff involved in the exchange to write up their experiences and findings.
- Any issues during the visit should ideally be sorted out between visitor and host organisation
- Bodleian Libraries, University of Oxford will evaluate the pilot to gain feedback and enable us to make improvements to the scheme
- After the visit staff may wish to stay in touch virtually with their contacts at the hosting organisation

- After the exchange staff may wish to contact others who have been on exchange. This could be done via a Skype conference call or via a mailing list. This can be for all people involved in the exchange or for topic specific groups, for e.g. those working in scholarly communications
- Feedback for improvements to the scheme should be sent to [staff-dev@bodleian.ox.ac.uk](mailto:staff-dev@bodleian.ox.ac.uk)

## Hosting

- The hosting institution will help the visiting staff member to organise accommodation and other necessities such as travel from the airport for the exchange visit.
- The hosting institution will, if possible, provide a visitors account for the visiting staff member so they have use of a PC or a space where they can use their laptop or device during the exchange
- The host organisation will manage the visiting persons timetable and be responsible for their well-being whilst on exchange
- We recommend the hosting organisation organise for the visiting staff member to deliver a talk to staff during their visit
- If applicable the hosting organisation can arrange visits to other institutions which will be of interest to the visiting staff member, for e.g. staff who come to Oxford on exchange may like to include a visit to Cambridge or another academic library, such as Oxford Brookes or Reading.
- The host organisation will share knowledge and information openly and honestly with the visiting staff member
- The hosting organisation will deliver a presentation to colleagues in the workplace about the visit and their learning from the exchange
- Hosts reports should be shared with the visiting organisation, colleagues at home and the other IARU libraries. Shared reports must be agreed between the visiting staff member and hosting organisation to ensure everyone is happy with the information being shared.
- The hosting organisation will have a point of contact that the visiting staff member can go to if anything goes wrong or if unforeseen circumstances mean the visit needs to be cut short, e.g. illness, bereavement in family etc. This hosting organisation will work with the point of contact at the visiting organisation to ensure the welfare of the visiting staff member.

## Visiting

- Staff would be expected to undertake an exchange visit in work time.
- Staff should avoid arranging a visit during busy times of the year such as the start and end of term or at times when they need to be in the office, e.g. the start of the academic year
- Staff should take time to prepare in advance to ensure they develop clear objectives for a visit, are able to be released from work and can take advantage of cheaper travel costs.
- Managers of staff who are attending an exchange visit should give staff time in advance of the visit for planning and also afterwards for writing up their report.
- Managers of staff who are attending an exchange visit are also expected to support their staff member and ensure their welfare during the visit.
- The visiting organisation will have a point of contact that the hosting organisation or visiting staff member can go to if anything goes wrong or if

unforeseen circumstances mean the visit needs to be cut short, e.g. illness, bereavement in family etc. They will work with the hosting organisation to ensure the welfare of the visiting staff member.

- The visiting institution will cover the arrangements and costs of travel, accommodation and meals during the exchange. Any extracurricular activities will need to be covered by the visiting staff member.
- You may be asked to deliver a presentation to the hosting organisation about your work
- Any personal holiday that a staff member might want to add on to an exchange visit must be funded by the individual concerned.
- The visiting person will write up a report of their visit to include their learning and any actions that they intend to carry out on return to their workplace.
- The visiting person will deliver a presentation to colleagues in the workplace about their visit and learning from the exchange
- Reports should be shared with the hosting organisation, colleagues at home and the other IARU libraries. Shared reports must be agreed between the visiting staff member and hosting organisation to ensure everyone is happy with the information being shared.

### **Environmental Impact**

In order to reduce the environmental impact of the scheme and also keep in line with the IARU Green Libraries project, we need to consider the following:

- Offsetting flights – companies such as Climate Care can be used to offset carbon emissions
- Using virtual where possible prior to the exchange and afterwards to stay in contact.
- Potentially tying in journeys to a conference with an exchange opportunity
- Make sharing good environmental practice part of the agenda
- Being transparent about the number of flights made

## 7.7 Lifelong Learning

<b>Lead</b>	<i>National University of Singapore</i>
<b>Reporting</b>	<i>Associate Professor Woei Wan Tan</i>
<b>Executive summary</b>	<p>The Lifelong Learning Working Group was formed at the L3 Workshop in November 2019. The consensus was, and remains, to collaborate virtually, and where possible, meet at the sidelines of educational conferences. Due to COVID-19 travel restrictions, two virtual meetings were held using Zoom. In November 2020, the group shared best teaching continuity practices to cope with COVID-19 challenges. All institutions successfully switched to online delivery of continuous education classes, and with time, most instructors were able to teach using virtual conferencing platforms. The topic of micro-credentials was discussed on 22 April 2021. University of Copenhagen organized a micro-credentials sharing session between NUS and Lifelong Learning representatives in December 2021. Going forward, the group plans to meet at the sideline of conferences, such as UPCEA (University Professional &amp; Continuing Education Association) Conference.</p>
<b>Funding to date</b>	<p><i>No current funding allocation</i></p> <p>-- USD 10,000                      Inaugural meeting at NUS (November 2019)</p>
<b>Outcomes of previous meetings</b>	<p><b>Senior Officers' Meeting, October 2021 (Online)</b></p> <p>The Lifelong Learning group did not make any budget requests.</p> <p><b>Senior Officers' Meeting, October 2020</b></p> <p>The group planned to hold an online meeting to share experiences this October, but it was postponed. Li Ling Koh (NUS) gave an update and stated that the meeting will be held in November instead. There was no funding request as all of their activities are done virtually. Kiichi Fujiwara (UTokyo) pointed out that arranging online meeting itself is good, but , IARU community must think of the ways to actually move the initiative forward by using online resources and in order to do so, we should ask each group to come up with ideas.</p> <p><b><u>Takeaways</u></b></p> <p>The Secretariat will follow up on the group's activities and ask for their ideas on what they would do when they cannot meet for a short period of time, or a prolonged time.</p> <p><b>Senior Officers' Meeting, September 2019</b></p> <p>The Lifelong Learning initiative was first discussed in SOM 2018 and developed at PM 2019, and Andrew Wee (NUS) updated the information on the related meeting (L3 Workshop) held on 8-9 November 2019 at NUS. The workshop consists of open sessions on general topics for a wider audience and closed sessions on specific topics for IARU</p>

participants only. NUS recruited some panelists from partner institutions, but were still calling for additional speakers from IARU.

Funding for the workshop (USD 10,000) was already approved in SOM 2018. Interested members would need to make a registration as soon as possible.

### **Presidents' Meeting, January 2019**

Andrew Wee (NUS) introduced their Lifelong Learners Program (NUS L3) and proposed a two-day L3 meeting. USD 10,000 for NUS to host the meeting was already approved at the 2018 Senior Officers' Meeting.

NUS L3 is a list of skill-based, industry-relevant courses in 10 key disciplines that aim to reskill NUS alumni. Graduates who completed their degree at NSU and those whose enrolment is within 20 years from the point of first admission are eligible for the program. Because the Singapore government worries that the skills of university graduates easily become out-of-date in the rapidly changing society today, generous funding supports are offered to Singapore citizens attending NUS L3 for them to stay competent in the digital age. One key to the success is a close relationship with big companies like Microsoft and IBM, which gives the course a high credibility.

The goal of the L3 meeting is: 1) to introduce the new approach to continuous learning or lifelong education; 2) to discuss how the future of work might evolve and the role of universities; 3) and to explore the possibility of launching a new joint certificate course among IARU members. The core wide topics that NUS L3 covers could lead this proposal to a new student program. There was also an option to hold the meeting collaboratively with the Institute for the Future (IFTF), a US-based non-profit think tank that was established in 1968. NUS will seriously consider the option and check if the logistics work out.

All presidents especially PKU, UTokyo, UCPH, and UCT, showed their interests in the proposed program, but found it still premature to make some decisions to go forward. NUS will proceed with the project cautiously and table a more refined proposal at the 2019 Senior Officers' Meeting.

## Lifelong Learning

In April, representatives from ANU, ETH Zurich and NUS shared how micro-credentials are structured in the respective institutions. Brief meeting notes follow:

ANU	<ul style="list-style-type: none"> <li>• Focusing on graduate programmes. 6 micro credentials stack to 1 course and 4 courses stack to a certificate.</li> <li>• Due to COVID-19 pandemic, the Australian government has offered discounts for displaced workers to upskill and re-skill via a full-time programme. Consequently, interest in micro-credentials has been diluted.</li> </ul>
ETH Zurich	<ul style="list-style-type: none"> <li>• A certificate is worth a minimum of 10 European Credit Transfer and Accumulation System (ETCS) points.</li> <li>• Any learners may enroll for a module (no entry requirement), but ETCS will not be awarded. If learners wish to earn credits, they must switch to a certificate programme within the stipulated time.</li> </ul>
NUS	<ul style="list-style-type: none"> <li>• Non-credit bearing short courses can stack towards a Professional Certificate.</li> <li>• An Executive Certificate is equivalent to a credit-bearing semester long module.</li> <li>• Executive Certificates may be stacked towards a Specialist or a Graduate Certificate.</li> </ul>

For additional information about plans for 2023, see budget request.

## Lifelong Learning Funding Request Form

### Project Name/Year:

Lifelong Learning Working Group Meetings 2022–23

### Total Requested Amount & Breakdowns:

Item	Amount
Working Group Meeting attached to UPCEA 2023, Washington US, March 2023	USD 6,500
Working Group Meeting in Cambridge, Autumn 2023	USD 7,500
<b>Total Requested Amount</b>	<b>USD 14,000</b>

\*Please note that it is required to report how the approved funding is actually used and the outcomes later in the annual status report.

### Other Financial Resources (if applicable):

Discussions will be held with other organisations to explore the possibility of additional, or matched, funding. These include partner organisations as well as other organisations associated with the delivery of lifelong learning

### Participants List (Please specify the lead by adding “Lead” next to the name):

It is expected that all members will participate in at least one of the meetings, with most attending both. Precise members for each University are being confirmed.

University	Title/Position	Name
ANU		
<b>ETH Zurich</b>	Head of the School of Continuing Education	Dr Lukas Sigrist
<b>NUS</b>	Vice-Dean, School of Continuing and Lifelong Education	Prof. Woei Wan Tan (Joint Lead)
<b>PKU</b>		
<b>Berkeley</b>		
<b>Cambridge</b>	Deputy Director of Academic Centres	Tom Monie (Joint Lead)
<b>UCT</b>		
<b>Copenhagen</b>	Head of Lifelong Learning / Head of Continuing and Professional Education	Sanne Nielsen / Mette Bergenser
<b>Oxford</b>	Director of British and Cultural Studies, Department of Continuing Education	Dr Charles Boyle
<b>UTokyo</b>		
<b>Yale</b>		

\*The list does not need to be complete in case not all participants are confirmed yet.

**Details of the Project (background, purpose, expected outcomes, schedule, project's continuity, etc.):**

Following formation of the working group and an inaugural in-person meeting at NUS in November 2019 activities were forced to switch online due to the pandemic. Online discussions were held to share best practice and discuss microcredentials. As many are aware the pandemic has altered the perception of lifelong learning at a global level. A greater number of non-University players have entered the market. Working group members are now keen to re-engage in person and begin to develop and build a coherent approach to lifelong learning between and across the members.

A side meeting adjacent to the March UPCEA will allow re-engagement with American partners and preliminary discussions to be held around the longer term focus of the group. This timing will facilitate integration of other lifelong learning specialists as guest contributors to the discussions focusing on learning from the pandemic and best practice.

In the autumn of 2023 a meeting will be held in Cambridge, taking advantage of the ongoing 150 year celebrations of the University of Cambridge Institute of Continuing Education. The focus of this meeting is yet to be determined but may focus on enhancing inclusive practice in lifelong learning and developing effective collaborations in the delivery of lifelong courses between IARU members.

Both these meetings will be important in allowing the IARU members to ensure that they are following best practice in lifelong learning and adapting to the changing environment in this sector as a result of the pandemic. Longer term, the development of the group's activities should foster a culture of co-delivery and participation in lifelong learning between member institutions.

## 7.8 Novo Nordisk International Talent Program

<b>Lead</b>	<i>UCPH</i>
<b>Reporting</b>	<i>Sara Dinesen</i>
<b>Executive summary</b>	<p>The Novo Nordisk International Talent Program supports student mobility between University of Copenhagen and partners in the International Alliance of Research Universities. In 2022 the programme will be supporting 33 students during their studies abroad.</p> <p>It has previously been announced that NNITP would close by the end of 2022. We are happy to share with the IARU Senior Officers, that this is not the case, and NNITP will be supporting mobility students in 2023. The first of two application rounds, aimed at student mobility in 2023, will take place in October 2022 and will close on October 25, 2022. For further information please visit <a href="https://studies.ku.dk/visiting/scholarships/">https://studies.ku.dk/visiting/scholarships/</a></p> <p>It is anticipated that the Novo Nordisk International Talent Program will run until the available funding has been distributed to mobility students. It is expected that the scheme will run into 2024 and then finish, but this will depend on the level of interest from applicants.</p>
<b>Funding to date</b>	<i>n/a</i>
<b>Outcomes of previous meetings</b>	<p><b>Senior Officers' Meeting, October 2020</b></p> <p>Søren Nedergaard (UCPH) reported that due to COVID-19 pandemic, the program experienced drop in application for summer and fall. While the initial message from Novo Nordisk mentioned in the Tome remained positive, Novo Nordisk informed UCPH that the final decision on the continuation of the program is put on hold, and they are considering a different format. UCPH will update partner institutions on Novo Nordisk's final decision.</p> <p><b>Senior Officers' Meeting, September 2019</b></p> <p>Søren Nedergaard (UCPH) reported that 54 students would be awarded scholarship this year. Novo Nordisk were very satisfied with the program; however, the spring semester 2020 would be the final term of the program. UCPH is now exploring an opportunity to continue the program and inform partner institutions of the results later.</p> <p><b>Senior Officers' Meeting, September 2018</b></p> <p>Tina Berglöv Kjær (UCPH) reported that the Novo Nordisk International Talent Program was established in 2015 and has funded 219 students. Each year, Novo Nordisk donates approximately USD 400,000 to support either student travel to UCPH or UCPH students going to NNITP partner schools to conduct studies in science. This program includes all eleven</p>

	<p>IARU partners, as well as Harvard University and the newly added University of Sydney. Participating students are given scholarships totaling approximately USD 6,000.</p>
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## **Novo Nordisk International Talent Program**

The Novo Nordisk International Talent Programme (NNITP) supports student mobility between University of Copenhagen and partners in the International Alliance of Research universities (IARU). The programme was established in 2015 by University of Copenhagen (UCPH) and the Danish company Novo Nordisk. The programme offers scholarships for up to 335.000 Euro annually.

In 2020 the programme partners agreed to extend NNITP to the end of 2022. More recently, it has been agreed that the programme will be extended beyond 2022, until the all the available funding has been allocated. The next round of applications will close on 25 October 2022.

NNITP supports student mobility between UCPH and the IARU partners within the area of Science and Health Sciences. The programme gives priority to projects pertaining to metabolism, insulin, haemoglobin, obesity, big data and digitalisation.

NNITP supports short term mobility, semester mobility and recently online courses have been added to the list of activities for which students can receive support.

Due to the COVID-19 pandemic the programme has experienced a drop in the applications and scholarships awarded. In the academic year 2020–2021 6 students were awarded a NNITP scholarship.

Please visit <https://studies.ku.dk/visiting/scholarships/> for further information.

## 7.9 Real Estate Working Group

<b>Lead</b>	<i>University of Cape Town</i>										
<b>Reporting</b>	<i>Jehan Begg (UCT)</i>										
<b>Executive summary</b>	<p>The IARU Real Estate Working Group is a forum for collaboration and information-sharing about the interests and challenges in the field of real estate management for research universities, contributing to a platform for learning through sharing our institutions' experiences and good practice examples. Members participate to the extent feasible to share knowledge about topics in higher education real estate development and management such as physical and land use planning, capital investment, facility management, space utilisation, fiscal constraints, and other associated administrative policies and practices that may emerge as the group's work progresses.</p> <p>A terms of reference iterative document was drafted and approved by the committee to define the purpose of the committee along with statutory requirements. The REWG established a voluntary steering committee who meet quarterly to drive the objectives as set out by the full REWG. This mitigated scheduling issues across time zones and allowed the committee to remain on course during the disruptive COVID-19 phase.</p>										
<b>Funding to date</b>	<p>2022:</p> <table> <tr> <td><i>USD 10,000</i></td> <td><i>Group Meeting</i></td> </tr> <tr> <td><i>USD 5,000</i></td> <td><i>REWG Website Development &amp; Updates</i></td> </tr> <tr> <td><i>USD 2,000</i></td> <td><i>Annual Report, Publications and Toolkit Development</i></td> </tr> </table> <p>---</p> <p>2021:</p> <table> <tr> <td><i>USD 10,000</i></td> <td><i>Group Meeting</i></td> </tr> </table> <p>2020:</p> <table> <tr> <td><i>USD 10,000</i></td> <td><i>Group Meeting</i></td> </tr> </table>	<i>USD 10,000</i>	<i>Group Meeting</i>	<i>USD 5,000</i>	<i>REWG Website Development &amp; Updates</i>	<i>USD 2,000</i>	<i>Annual Report, Publications and Toolkit Development</i>	<i>USD 10,000</i>	<i>Group Meeting</i>	<i>USD 10,000</i>	<i>Group Meeting</i>
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<i>USD 10,000</i>	<i>Group Meeting</i>										
<i>USD 10,000</i>	<i>Group Meeting</i>										
<b>Outcomes of previous meetings</b>	<p><b>Senior Officers' Meeting 2021</b> Senior Officers approved the budget request for 2022.</p> <p><b>Senior Officers' Meeting 2020</b> COVID-19 turbulence prevented the group from tackling their original projects planned last year and from holding their annual face-to-face meeting in Cape Town. Instead they held two virtual meetings separately on a regional basis. The group shared information on impacts arising from the pandemic and recovery planning, and updated their future work program until 2022. Lead of the group will be transferred from Cambridge to Cape Town. Senior Officers approved the carryover request of USD 10,000.</p>										

	<p><b>Senior Officers' Meeting 2019</b></p> <p>Karen Kennedy (Cambridge) presented REWG's report on the meeting on 4-5th September at Yale that was held simultaneously with CSI. Joint sessions dealt with diverse topics including space efficiency &amp; productivity benchmarking, where both groups recognized significant added value in the crossfertilization of ideas and in undertaking joint works. The annual meeting in 2020 will be held together with SCI again. There was also steady progress in other topics. The space norms project, the topic REWG works on independently, for example, collected information on policies and standards at IARU universities and commentary on practicing implementation. Identifying consistent themes will lead to a good practice guide and toolkit that will benefit the IARU partners. Senior Officers approved the USD 10,000 funding request for the next annual meeting.</p>
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## Summary of Activities

### Annual Meeting

The full REWG met on 12 May 2022 in lieu of an in-person conference meeting which was postponed again due to varying/unpredictable travel requirements between countries.

All member universities were present at the meeting despite the time zones. A special thank you to all members for joining with a special thank you to Wendy Hillis, representing Berkeley, who stayed up late to join.

### Objectives for 2022–2023:

- In-person conference to be scheduled (in collaboration with Sustainability Group if possible)
- Promote work done by the REWG by updating the website with short summaries of workstreams and progress in each.
- Close out the COVID-19 period and future ways of working with documented and consolidated reports from all universities.
- Identify representatives from Yale and PKU.

### Post-Covid Discussion:

The REWG was significantly impacted by the COVID-19 pandemic as universities adjusted to remote teaching and learning practices combined with social distancing. Facilities departments under the guidance of Occupational Health and Safety units were fundamental to reacting to changing statutory requirements and implementing university risk adjusted strategies.

Challenges discussed (varying degrees of impact across universities)

- Reactive strategies to accommodate teaching and learning needs amidst the pandemic i.e. capacity planning and HVAC
- Focus on Digital Masterplans to improve space efficiencies

- Hybrid working challenges i.e. creating fit for purpose spaces whilst managing costs of maintaining buildings still partially empty or not at full capacity.
- Unique economic and environmental contexts (varies from country to country) i.e. traffic, load shedding etc.
- Shaping the future: still being defined in terms of redefining roles and its requirements i.e. teaching and learning, research and administration.
- Low registration rates for universities reliant on international students
- Limited CapEx Budgets predicted due to a culmination of the above

The committee discussed briefly the expectation that the pandemic would present more opportunities to dispose of real estate however there remains a demand for space and a reluctance to give up space.

Increased focus on staff wellness noted as a common theme across all universities.

The principles of each work stream remain the same with significant developments since the pandemic

### 1. Space Use and Efficiency

- Space Benchmarking (Cambridge)
- Space Norms Project (Oxford/NUS)
- Agile working

### 2. Future Learning Environment/MOOC

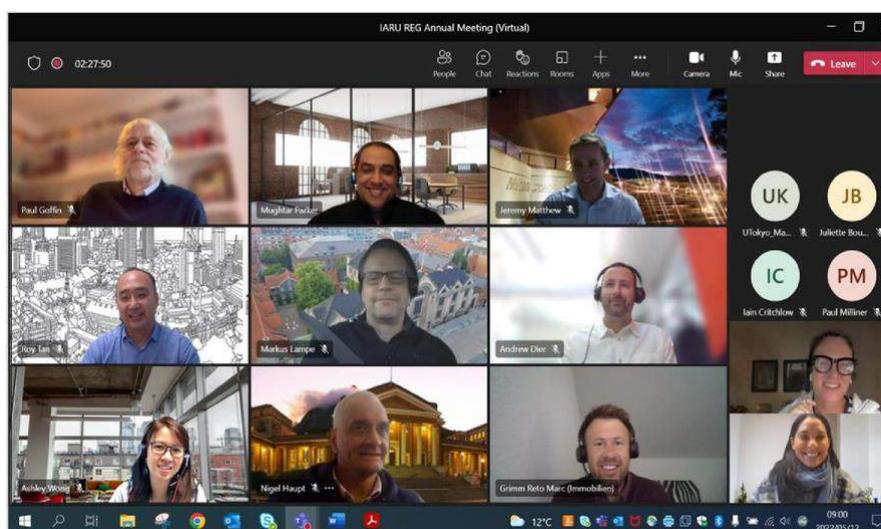
- Digital Learning (UCB)
- Student Experience (NUS)
- Utilisation Technology (UCT/Oxford)

### 3. Resource Planning

- Long term/range capital plan (UCB)
- Life Cycle Costing 2021 (ETH/COP)
- Energy Infrastructure Planning 2022 (ETH/NUS/UCB)
- Functional suitability 2021 (Cambridge)

In-person conference planning underway for tend March 2023 in Cape Town, South Africa.

Next meeting scheduled for November 2022 to finalise conference agenda.



## Real Estate Working Group Funding Request Form

### Total Requested Amount & Breakdowns:

Item		Amount
1.	Annual Meeting - Cape Town South Africa (includes conferencing, meals, hosting activities)	USD 10,000 (carry over from 2022)
	2023 additional request to account for escalations and enhancements (RSA inflation)	USD 2,500
2.	Technology: REWG Website Development and Updates	USD 2,500
3.	Staff Development and Exchange Programme (Flights, subsistence and travel, accommodation)	USD 3,000
4.	Annual Report. Publications and Toolkit Development Miscellaneous	USD 2,000
<b>Requested carry over funds</b>		USD 10,000
<b>New requested funds</b>		USD 10,000
<b>Total Requested Amount</b>		USD 20 000

\*Please note that it is required to report how the approved funding is actually used and the outcomes later in the annual status report.

### Other Financial Resources (if applicable):

UCT facilities and resources to be used for cost saving where possible

### Participants List (Please specify the lead by adding "Lead" next to the name):

	University	Title/Position	Name
1.	ANU	Associate Director: Projects, Facilities & Services	Jeremy Matthew
2.	ETH Zurich	Portfolio Manager	Reto Grimm
3.	NUS	Associate Director: Campus Planning and Management	Ashley Wong
4.		Head & Senior Associate Director, Space Planning & Management	Roy Tan
6.	Berkeley	Director: Capital Planning, Planning Strategies	Wendy Hillis

7.	<b>Cambridge</b>	Head of Strategy & Planning	Paul Milliner
8.		Business Information Manager	Juliette Bourgeois
9.	<b>UCT (Lead)</b>	<b>Executive Director: Properties &amp; Services</b>	<b>Mughtar Parker</b>
10.		Director: Capital Planning & Projects	Nigel Haupt
11.		Business Manager (IARU Servicing Officer)	Jehan Begg
12.	<b>Copenhagen</b>	Campus Drift of Digitisation Chief	Markus Lampe
13.	<b>Oxford</b>	Director Estates	Paul Goffin
14.	<b>UTokyo</b>	Professional Staff, Facilities Planning Group	Tsunehiro Hanayama
15.	<b>Yale</b>	N/A	
5.	<b>PKU</b>	N/A	

\*The list does not need to be complete in case not all participants are confirmed yet.

### Details of the Project (background, purpose, expected outcomes, schedule, project's continuity, etc.):

Please note that the Real Estate Working Group has not spent any funds since 2020 as all engagements have been online. We are requesting funding for 4 items listed above and outlined below. We will endeavour to meet the objectives as set out by the lead.

#### Annual Conference/Meeting in Cape Town, South Africa (March 2023)

- In-person conference to be scheduled (in collaboration with Sustainability Group if possible). This was confirmed in the REWG Annual meeting on the 12th May 2022 and therefore the funds will be spent.

#### Technology advancements – towards continuity, transparency and accessibility of information

- Promote work done by the REWG by updating the website with short summaries of work streams and progress thereof.

#### Staff Development and Exchange Programme

- We'd like to actively promote staff development and exchange by giving REWG members the opportunity to visit member universities. Not limited to REWG members but to the Real Estate departments within member universities. Motivations for this funding will be evaluated by the group with IARU central guidance if required.

## Annual Report. Publications and Toolkit Development

- An annual report on the accomplishments, special projects, and work that the REWG contributed to the Real Estate industry.

### Outcomes

The current projects are Space Utilisation & Efficiency, Future Learning Environment and Resource Allocation (see report) – this is more topical now due to the pandemic.

### Schedule

The funds requested for 2023 are to ensure that we meet, debate and discuss our outcomes annually and further foster global IARU relationships through personal social and professional relationships. Cape Town will be hosting the conference this year and most of the requested funds will be for this. The incremental ask for funds will be used to enhance our digital platform for information sharing, communication as well as add further rigor to our governance and administration processes. Since the REWG is still in its inception it requires a bit more investment to ensure the base planning is solid for future Chairs and working group members.

### Continuity

This is a perpetual working group that would perform continuous multi-year projects. Dependent on the current global context and landscape, the current and long-term funding requirements are aligned to current projects timeframes as follows:

The Chair has moved to Cape Town (University of Cape Town) for the 3 years with a new Chair to be chosen at the conference of the preceding year i.e., September 2023 for Jan – Dec 2024. This allows for continuity, consistency and is tied to the closing out of already planned projects in Dec 2023.

The request has remained the same over the past 2 years, however the group was unable to meet due to travel restrictions.

## 7.10 Sustainable Campus Initiative

<b>Lead</b>	<i>University of Cape Town</i>
<b>Reporting</b>	<i>Manfred Braune</i>
<b>Executive summary</b>	<p>The group's meetings and activity has been similar to previous years except for the face to face annual meet up that was again postponed for the 3<sup>rd</sup> year in a row due to Covid-19 travel restrictions and the uncertainty surrounding travel arrangements in various countries.</p> <p>The steering group has continued to meet virtually on a monthly or two-monthly basis and collaborations continue to develop in this context.</p> <p>The two key projects have continued and progressed, namely the Scope 3 emission project and the Future of Workspace project, largely through the post graduate student interns who have been working on these.</p>
<b>Funding to date</b>	<p>2022:</p> <p>USD 15,000                      <i>(Carry over from 2020) Sustainable Campus Initiative Annual Meeting in Cape Town</i></p> <p>USD 15,000                      <i>(Carry over from 2020) Scope 3 Carbon Emissions Project</i></p> <p>USD 15,000                      <i>(new) Future of Work (Joint SCI and Real Estate Group project)</i></p> <p>2021:</p> <p>USD 15,000                      <i>Carry over from 2020</i></p> <p>USD 15,000                      <i>Scope 3 Carbon Emissions Project</i></p> <p>USD 10,000                      <i>Global Climate University Programme</i></p> <p>USD 3,000                        <i>Biodiversity Knowledge Exchange.</i></p> <p>USD 500                         <i>Outreach Materials</i></p> <p>--</p> <p>2020:</p> <p>10,000 USD                      <i>Part-time fellow to manage SDG collaboration</i></p> <p>5,000 USD                        <i>Support for capacity building pilot event in Cape Town</i></p> <p>3,000 USD                        <i>Good practice and knowledge exchange on biodiversity</i></p> <p>500 USD                         <i>Outreach materials</i></p> <p>10,000 USD                      <i>Sustainability Meeting 2020</i></p> <p>2019:</p> <p>5,000 USD                        <i>Outward facing event in São Paulo during ISCN</i></p> <p>2,000 USD                        <i>Student support for communications and program development</i></p> <p>500 USD                         <i>Student design assistant</i></p>

	<p>10,000 USD collaboration 3,000 USD visit to 6,936 USD</p> <p>Part-time fellow to manage SDG Reimbursement for staff exchange: Yale ETH Sustainability Meeting 2019 (Yale) *Jointly held with Real Estate Working Group Meeting.</p>
<p><b>Outcomes of previous meetings</b></p>	<p><b>Senior Officers' Meeting, October 2021</b> The Senior Officers approved the funding request for a joint project on 'The Future of Work' between the Sustainable Campus Initiative and the Real Estate Working Group (USD 15,000). The Senior Officers also approved the request to carry over previous unused funding for the SCI Annual Meeting (USD 15,000) and IARU SCI Scope 3 Carbon Emissions Working Group (USD 15,000) to 2022.</p> <p><b>Senior Officers' Meeting, October 2020</b> The Sustainable Campus Initiative (SCI) had a very productive year in spite of the COVID-19 turbulence. The group added a chapter on Resilience and Response to Crisis, which features fresh case studies from six of the IARU members, to the publication on SDGs and Academia, originally launched online in 2019. In November, SCI will host the Global University Climate Forum, aiming to encourage students who will attend the 26th UN Climate Change Conference (COP26) in Glasgow, to share their ideas on feasible climate-related projects. The Forum received applications from 160 student groups from 121 universities of 40 countries, a total of 553 students. Staff exchange and an annual face-to-face meeting were cancelled due to the pandemic, however, the group held a virtual meeting for four days in October instead. The lead will be transferred from Oxford to Cape Town. SCI requested carryover of a total of USD 15,000, and another USD 28,000 consisting of USD 15,000 for Scope 3 Carbon Emissions Project, USD 10,000 for Global Climate University Programme, USD 3,000 for Biodiversity Knowledge Exchange. Senior Officers approved the requests submitted by the initiative: carry over of USD 15,000, and funding request of USD 28,000 for their 2021 activities.</p> <p><b>Senior Officers' Meeting, September 2019</b> Nina Tomlin (Oxford) reported that the Sustainable Campus Initiative (SCI) continued to be very active, holding its annual meeting on 3-5 September at Yale, partly together with Real Estate Working Group (REWG). The group is now formulating a long-term strategic plan with ambitious projects including integration with sustainability and climate. SCI's funding request of USD 18,000 consisted of USD 10,000 to set up a part-time fellow who would support Sustainability Offices' communication strategy, USD 5,000 to support capacity building pilot event in</p>

	<p>Cape Town, and USD 3,000 to promote good practices and knowledge exchange on biodiversity. Senior Officers valued high productivity of the SCI group and approved the USD 18,000 funding request for their 2020 activities.</p>
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## **Sustainable Campus Initiative Projects 2022**

### The Future of Workspace (Joint Project between the Sustainable Campus Initiative and Real Estate Working Group):

The first year of the Future of Workspace project has progressed well so far, with a desktop study completed successfully and interviews with IARU members beginning shortly. A full report and presentation will be prepared at the end of 2022.

The project has included the following activities:

- Sharing progress, projects, ideas, successes, failures and opportunities via two online meetings so far with the IARU SCI & Real Estate group (these meetings would be recorded and information collected and collated)
- A post graduate student who is a real estate specialist was appointed to undertake the desktop research – this was presented at one of the meetings
- Detailed interviews are being prepared, following with a presentation and a summary report will be prepared by the end of 2022

### SCI Scope 3 Carbon Emissions Working Group 2022 (deferred from 2021)

The aim of this project is collaborate on potential solutions and best practice tools and methodologies for some of the biggest common challenges when it comes to Scope 3 emissions in universities. In the first year of the project scope 3 data for the participating groups was analyzed and compared to decide which areas would be focused on. It was then decided that the working group would focus on 3 elements of scope 3 emissions, namely: air travel, procurement of goods and services and construction.

The second year of this project was again slower than expected due to other priorities and limited capacity during the covid-19 affected year. A post graduate student has been found in mid-2022 to assist with this project, which has allowed the detailed work to begin in July on the air travel policy investigation, interviews and report. By the end of 2022 it is anticipated that about 50% of the original \$15,000 will be utilized on this work.

### Sustainable Campus Initiative Annual Meeting 2022 at the University of Cape Town

The annual meet up in Cape Town was postponed again, due to uncertainty from various members regarding travel arrangements. It is proposed that the meet up is postponed to March 2023 or October 2023, depending on feedback from members.

## **Sustainable Campus Initiative Summary 2022**

The group had a somewhat productive year (less so than years pre-Covid). The highlights offered here include activity over the past year or so.

### 1. Projects

The projects are summarised above. The activity of the group has slowed somewhat this year, while all projects are led by Manfred Braune, with no other members having volunteered to lead projects in 2021/2022. As a result, work on projects has slowed somewhat but largely continued where intern students could be found to assist on the two main projects, namely scope 3 emissions and the future of workspace.

## 2. Publications

No new publications have been published in 2022 thus far, although work has continued towards projects that will be publishing some kind of shared report/publication. Recordings of the Future of Workspace meeting and presentation of the desktop research has been shared with members.

## 3. Agenda, Events & Meetings

The Sustainability group has committed to ensuring that all projects have tangible outcomes, that key projects enhance the visibility of IARU, and that group members maximize the value of their engagements and travel (where relevant).

Steering group meetings are continuing on a monthly to two-monthly basis.

A full group online annual meet up is planned over two days later in 2022 while the in person meet up is proposed to be held in March or October 2023.

## 4. Student Exchanges

No current staff / student exchanges were undertaken or planned in 2022 due to Covid-19 and lack capacity for members to host such students.

## 5. IARU SCI Governance and Administration

The steering group is currently represented by universities of Cape Town (current lead/chair), Oxford, and Berkeley (and until very recently Cambridge, Joanne Chamberlain has taken up a new post at another university not in the IARU network).

## New Funding Request Form

### Summary of Funding requested for 2023:

Project	Amount
01 – Future of Workspace Phase 2 (Joint SCI & Real Estate Project)	USD 15,000 (new)
<b>Total New Funds Requested by the IARU SCI Group 2023</b>	<b>USD 15,000 (new)</b>
02 – Sustainable Campus Initiative Annual Meeting in Cape Town	USD 15,000 (deferred 100%)
03 - IARU SCI Scope 3 Carbon Emissions Working Group	USD 7,500 (deferred 50%)
<b>Total Funds Proposed to be Deferred from 2022 to 2023</b>	<b>USD 22,500 (deferred)</b>
<b>Total Deferred and New Funds for 2023</b>	<b>USD 37,500 (new &amp; deferred)</b>

### Details of each project funding request:

#### New projects: 01

#### Project Name/Year:

Future of Work Joint SCI & Real Estate Project

### Total Requested Amount & Breakdowns:

Item	Amount
Future of Workspace Phase 2 (Joint SCI & Real Estate Project) Part time post graduate student intern to investigate detailed case studies on the Future of Workspace applied in practice at various IARU and other universities and prepare a summary report, presentations and host meetings for the IARU SCI & Real Estate Group. The cost also includes a graphic designer to assist with report design.	USD 15,000 (new)
<b>Total Requested Amount</b>	<b>USD 15,000 (new)</b>

\*Please note that it is required to report how the approved funding is actually used and the outcomes later in the annual status report.

### Other Financial Resources (if applicable):

Participant institutions will cover the cost of their meetings and additional work on this theme.

### Participants List (Please specify the lead by adding “Lead” next to the name):

University	Title/Position	Name
ANU	Associate Director Operations, Facilities and Services	Mathew Maclay
ETH Zurich	Environmental Officer/Deputy Head of Unit for Security, Human Health, and Environment	Domink Brem
NUS	Director, Office of Environmental Sustainability	Amy Ho

<b>PKU</b>	Section Chief of Reform, Office of Policy and Legislative Affairs	Wei Chen
<b>Berkeley</b>	Chief Sustainability & Carbon Solutions Officer	Kira Stoll
<b>Cambridge</b>	Head of Energy and Environment	Joanna Chamberlain
<b>UCT</b>	Director: Environmental Sustainability	Manfred Braune (lead)
<b>Copenhagen</b>	Head of Energy and Sustainability	Tomas Refslund Poulsen
<b>Oxford</b>	Head of Environmental Sustainability	Harriet Waters
<b>UTokyo</b>	Professor, Institute for Future Initiatives	Kensuke Fukushi
<b>Yale</b>	Director Yale Office of Sustainability	Virginia Chapman
<b>UCT</b>	Executive Director: Properties & Services	Mughtar Parker (co-Lead)
<b>UCT</b>	Business Manager: Properties & Services	Jehan Begg (support to co-Lead)
	<i>Plus the remaining IARU Real Estate group, whose names and details I don't have (only email addresses)</i>	

**Details of the Project (background, purpose, expected outcomes, schedule, project's continuity, etc.):**

The first year of the Future of Workspace project has progressed well so far, with a desktop study completed successfully and interviews with IARU members beginning shortly. A full report and presentation will be prepared at the end of 2022.

The project proposes to be extended into a second year, which will focus on particular case studies of solutions/projects that were implemented by IARU and other universities that can really help make solutions tangible to IARU members and other universities that will be able to benefit from a report that will be prepared summarizing the individual case study findings.

All IARU universities have severely been impacted by covid-19 and the related lockdowns, with much of our campus real estate standing empty. It has impacted how we have to think about our space use and supporting services in the future and requires exploratory thinking that most staff working in these real estate departments have little capacity for. While very few of us have firm plans ahead there is already some good work happening in pockets while much more work is required.

The purpose of this joint project between the IARU SCI and Real Estate Groups is to share and explore this theme together, to share our current thinking and plans as this evolves. The project is likely to extend over a few years as more clarity is gained on the state and impact of the covid-19 virus and its variants, and what kind of response is required from our real estate services. There is a strong link between these real estate operations and our sustainability objectives, and so this project will also explore these opportunities.

For 2023, the project would include the following activities:

- Sharing progress, projects, ideas, successes, failures and opportunities via online meetings (these meetings would be recorded and information collected and collated)

- Specific research by post graduate real estate specialists into specific case studies from IARU and other universities
- A presentation and a summary report will be prepared and the report will be posted on the IARU website

### Project funding deferred from 2022 to 2023:

02

#### Project Name/Year:

Sustainable Campus Initiative Annual Meeting at University of Cape Town March/October 2023

(THIS FUNDING WAS PREVIOUSLY AGREED FOR 2020 BUT HAS NOT YET BEEN CLAIMED IN 2020, 2021 or 2022)

#### Total Requested Amount & Breakdowns:

Item	Amount
Budget covers meeting accommodation and catering (not used in 2022– COVID impact. Proposed to be deferred to 2023)	USD 10,000 (deferred)
Capacity building pilot event in Cape Town (not used in 2022 – COVID impact. Proposed to be deferred to 2023)	USD 5,000 (deferred)
<b>Total Requested Amount</b>	<b>USD 15,000 (deferred)</b>

\*Please note that it is required to report how the approved funding is actually used and the outcomes later in the annual status report.

#### Other Financial Resources (if applicable):

Participant institutions will cover the cost of travel to the destination. The Real Estate Group would need to request/defer funding in their own application to cover the accommodation costs and venue hire contribution, if they again plan to join this event.

#### Participants List (Please specify the lead by adding “Lead” next to the name):

University	Title/Position	Name
ANU	Associate Director Operations, Facilities and Services	Mathew Maclay
ETH Zurich	Environmental Officer/Deputy Head of Unit for Security, Human Health, and Environment	Domink Brem
NUS	Director, Office of Environmental Sustainability	Amy Ho
PKU	Section Chief of Reform, Office of Policy and Legislative Affairs	Wei Chen
Berkeley	Chief Sustainability & Carbon Solutions Officer	Kira Stoll
Cambridge	Head of Energy and Environment	Joanna Chamberlain
UCT	Director: Environmental Sustainability	Manfred Braune (lead)
Copenhagen	Head of Energy and Sustainability	Tomas Refslund Poulsen
Oxford	Head of Environmental Sustainability	Harriet Waters

<b>UTokyo</b>	Professor, Institute for Future Initiatives	Kensuke Fukushi
<b>Yale</b>	Chief Manager for Sustainability Operations & Strategic Data Yale Office of Sustainability	Lindsay Crum

**Details of the Project (background, purpose, expected outcomes, schedule, project's continuity, etc.):**

The SCI participants have been meeting annually and collaborating for over 10 years. During that time, the group has coproduced a book with guidance on greening universities, a website showcasing institutions' work to deliver the Sustainable Development Goals (SDGs) and numerous events engaging and upskilling students and staff on sustainability issues.

The group have recently decided that they plan to continue to meet regularly but reduce the in person meetings to once every two years. The meeting has been postponed in 2020, 2021 and 2022 due to the covid-19 impact on travel, which left most members very uncertain about making any travel bookings.

It is proposed that the meet up now be held in March or October 2023 with the following same objectives:

- Sharing progress from working groups and developing action items on scope 3 carbon emissions,
- Feedback, progress and engagement on the Future of Workspace project
- Feedback, progress and engagement on the Scope 3 Emissions project
- Developing new project ideas
- Capacity building / teaching to local students/professionals
- Visiting various UCT green building projects
- General networking and building of relationships amongst the IARU network

A 3 ½ day programme will be finalised once the final date is agreed.

## Funding Request Form

03

### Project Name/Year:

IARU / SCI Scope 3 Carbon Emissions Working Group 2023

### Total Requested Amount & Breakdowns:

Item	Amount
Post graduate student intern (8 months) to help with data collection and analysis on scope 3 projects from IARU universities in working group (not all used in 2022 (estimated 50%) – this project has been slow largely due to the project leader's capacity)	USD 6,000 (deferred)
Graphic design of final report to be shared online. (not used in 2021 – COVID impact. Proposed to be deferred to 2022)	USD 1,500 (deferred)
<b>Total Requested Amount</b>	<b>USD 7,500 (deferred 50%)</b>

\*Please note that it is required to report how the approved funding is actually used and the outcomes later in the annual status report.

### Other Financial Resources (if applicable):

No financial contribution. Only time from members contributing to the project.

### Participants List (Please specify the lead by adding "Lead" next to the name):

University	Title/Position	Name
ANU		
ETH Zurich	Environmental Officer/Deputy Head of Unit for Security, Human Health, and Environment	Domink Brem
NUS		
PKU		
Berkeley		
Cambridge	Head of Energy and Environment	Joanna Chamberlain
UCT	Director: Environmental Sustainability	Manfred Braune (lead)
Copenhagen	Head of Energy and Sustainability	Tomas Refslund Poulsen
Oxford		
UTokyo		
Yale	Chief Manager for Sustainability Operations & Strategic Data Yale Office of Sustainability	Lindsay Crum

\*The list does not need to be complete in case not all participants are confirmed yet.

### Details of the Project (background, purpose, expected outcomes, schedule, project's continuity, etc.):

The aim of this project is collaborate on potential solutions and best practice tools and methodologies for some of the biggest common challenges when it comes to Scope 3 emissions in universities. In the first year of the project scope 3 data for the participating groups was analyzed and compared to decide which areas would be focused on. It was then

decided that the working group would focus on 3 elements of scope 3 emissions, namely: air travel, procurement of goods and services and construction. The second year of this project was again slower than expected due to other priorities and limited capacity during the covid-19 affected year. A post graduate student has been found in mid-2022 to assist with this project, which means the detailed work could begin in July on the air travel policy investigation and report. By the end of 2022 it is anticipated that about 50% of the original \$15,000 will be used, which is why it is proposed that \$7,500 be deferred to 2023.

## 7.11 Virtual Museum Tours

<b>Lead</b>	<i>Peking University</i>
<b>Reportings</b>	<i>Dr. Li Yun, Ms Lu Jiao, Ms Han Yifei</i>
<b>Executive summary</b>	<p>In 2021, virtual tours by ETHZ, UCPH and PKU were presented and added to the IARU website.</p> <p>ETHZ's focusTerra museum produced a number of videos, lectures and a live virtual Q&amp;A session on Mars and the NASA InSight mission.</p> <p>UCPH's contribution took the form of a 360° digital experience of the living botanical collections in Copenhagen's historic Palm House.</p> <p>PKU offered the virtual tour on the work of French master Eugene Delacroix.</p> <p>In early 2022, PKU launched an exhibition of artefacts from Shanxi bronze culture and it is hoped that contributions from Oxford and Tokyo will be added to the range of tours.</p> <p>On 13<sup>th</sup> July 2022, Oxford held Pitt Rivers Museum Virtual Tour Workshop online. Participants including students from PKU, Oxford, NUS and IC jointly tested and discussed the virtual museum project.</p>
<b>Funding to date</b>	<i>USD 40,000 (up to) 2021 Funding</i>
<b>Outcomes of previous Senior Officers' Meetings</b>	<p><b>Senior Officers' Meeting, October 2021</b></p> <p>Peking University requested USD 14,200 for 2022. This would fund three planned projects at three universities: Oxford, Peking, and Tokyo. The University of Tokyo also joined the programme for 2021, a development that occurred too late to be included in the Tome.</p> <p>While Peking had made progress in its planned programmes this year, COVID had again affected what NUS, ETHZ and UCPH had been able to do. It is likely, therefore, that the Secretariat will ask Senior Officers to approve funding carryovers for these universities in the coming weeks.</p> <p>Anders Hagström (ETH) expressed thanks to Peking for this initiative, saying it was a great example of a creative response to the current situation.</p> <p><b>Senior Officers' Meeting, October 2020</b></p> <p>Xia Hongwei (PKU) introduced Virtual Museum Tour, which was proposed in SOM in July. PKU have conducted survey among IARU universities to find out that there are more than 50 museums among 11 IARU universities which covers various academic disciplines. They would like to establish multi-</p>

disciplinary/multicultural learning platform, utilizing these museums. In addition to PKU, ETH Zurich, Copenhagen, NUS are currently confirmed to participate in this initiative. They requested a funding of USD 2,000 for each participating university. With this fund, they wish to cover the cost of following items:

- Costs for Online Exhibition
- Honoraria for Invited Lectures
- Publication
- Translation

Nina Tomlin (Oxford), Jane O'Dwyer (ANU), Karen Kennedy (Cambridge), and Carolyn Newton (UCT) raised a concern about paying honorarium to faculty members participating in this initiative, as IARU working groups has not paid honorarium to faculty members before. Søren Nedergaard (UCPH) also agreed with not paying honoraria from the IARU fund.

\*The Senior Officers otherwise supported the initiative. \$40,000 was subsequently awarded for 2021 to allow members to join in addition to those who were already involved at the time of SOM 2020.

## Virtual Museum Tours

### Background

University museums serve the important roles of educational, cultural and social service on campus, and provide the faculty and students with unique opportunities to understand and enjoy special topics of wide interest. The collections and exhibitions of a university museum represent its unique history and features, and can be an excellent channel for communication among the universities as well as to the public.

The eleven member universities of IARU have more than 50 museums in total, covering topics such as art, archaeology, anthropology, agriculture, biology, botany, zoology, history, natural science, earth and planetary science, health and medicine, music and musical instruments, etc.

In response to the calls and discussions by IARU Presidents Meeting and Senior Officers Meeting held in June and July 2020, the IARU Virtual Museum Tours initiative was proposed as part of the IARU Virtual Campus Initiative and received warm feedback among the member universities.

In the COVID-19 pandemic/post pandemic era, the Virtual Museum Tours and lectures will constitute a multi-cultural and multi-disciplinary platform for faculty and students across the continents to visit university museums online, to see their distinct collections, and to learn about background knowledge the beyond the exhibits.

### Purposes and Expected Outcomes

The purposes of the IARU Virtual Museum Tours include:

- To promote multilateral exchange and collaboration among IARU member universities
- To create a cultural and academic platform for shared experiences and dialogue on museums and related history, arts and science topics, enriching the virtual campus life of IARU students and faculty
- To share the museum resources of IARU member universities with the wider public, therefore serving society and promoting international understanding as a whole at this difficult time

The 2023 VMT is now communicating with partner universities and we will provide the updated list of the exhibitions soon.

## Funding Request Form

### Project Name/Year:

IARU Virtual Museum Tours 2023

### Total Requested Amount & Breakdowns:

Item	Amount
To support up to 4 virtual museum tours over the course of the year, estimating USD 5,000 for each project	USD 20,000
<b>Total Requested Amount</b>	USD 20,000

\*Please note that it is required to report how the approved funding is actually used and the outcomes later in the annual status report.

### Other Financial Resources (if applicable):

None

### Participants List (Please specify the lead by adding "Lead" next to the name):

University	Title/Position	Name
ANU		
ETH Zurich		
NUS		
PKU		
Berkeley		
Cambridge		
UCT		
Copenhagen		
Oxford		
UTokyo		
Yale		

\*The list does not need to be complete in case not all participants are confirmed yet.

### Details of the Project (background, purpose, expected outcomes, schedule, project's continuity, etc.):

University museums serve the important roles of educational, cultural and social service on campus, and provide faculty and students with unique opportunities to understand and enjoy special topics of wide interests. The collections and exhibitions of a university museum represent its unique history and features, and can be an excellent channel for communication between the universities as well as different societies.

The eleven member universities of IARU have more than 50 different museums in total, covering topics such as art, archaeology, anthropology, agriculture, biology, botany, zoology, history, natural science, earth and planetary science, health and medicine, music and musical instruments, etc.

Throughout 2021 and 2022, a number of virtual tours and online events have been successfully launched on the IARU website with further contributions expected in due course.

To continue the success of this project, the initiative leads at PKU would like to request up to USD 20,000 of funding to support future tours. At the moment, PKU is awaiting detailed proposals from partner universities and therefore the requested funding would be for tours yet to be confirmed. If the funding is approved in principle, details of the new tours could be circulated to Senior Officers in due course for final approval.



INTERNATIONAL ALLIANCE OF  
RESEARCH UNIVERSITIES

## **Session 8: Expanding IARU Membership into Latin America**

Interim Report from working group:

**Mr Don Filer (YALE)**  
**Ms Carolyn Newton (UCT)**  
**Ms Renata Schaeffer (CAM)**



INTERNATIONAL ALLIANCE OF  
RESEARCH UNIVERSITIES

## **Session 9: Update on Secretariat Proposals**

- 9.1 IARU Handbook
- 9.2 Education Initiatives Committee
- 9.3 Early Career Researchers Funding

## 9.1 Group Handbook

*For discussion and decision by the Senior Officers. Submitted by the Secretariat.*

*The draft Group Handbook is provided at the end of this section.*

At SOM 2021 the Senior Officers endorsed the proposal to create guidance to assist new groups and better support continuity within existing groups.

The Secretariat has drafted a Handbook which covers the following subjects: establishing a new group, the types of activities that groups undertake, reporting and administrative expectations, closing a group, and frequently asked questions. The intention of the guidance is to focus and support the activities of groups, rather than impose top-down control, and so the Secretariat is mindful of the concerns of existing groups.

Although in general the Handbook articulates existing practices of the Secretariat and IARU's groups and initiatives, there are some procedures and pieces of guidance that the Secretariat would like to bring to the Senior Officers for discussion.

In particular, the Secretariat would like the guidance of Senior Officers on the following points:

- **What should be the process for setting up a new group?**

The Handbook proposes that the first step should be those interested in starting a new group to informally gather together interested members; a proposal (and funding request if needed) would then be written; this would be presented at the next Senior Officers' Meeting, who may request further detailed work or clarification; and finally, if recommended, it would be submitted for approval at the Presidents' Meeting.

*Details of this section of the proposal are on page 105.*

- **Should new groups have a three-year duration by default?**

It is proposed that new groups would be set up for a period of up to three years initially, rather than being open-ended. At the end of the agreed period, the Senior Officers will review the group's activities and decide whether it has achieved its original aims (and can therefore be wound down), or if its term should be extended if there is further work for it to do. For example, a new project may have been identified by the group or there may be continued value in the networking it provides.

By establishing groups with a task-and-finish model (rather than being open-ended), the intention is to keep the groups relevant and active, and create capacity for funding new groups when needed.

*Details of this section of the proposal are on page 105.*

- **Would a new format for reporting group updates be helpful for the Senior Officers?**

At the Presidents' Meeting, the comment was made that the current format made it difficult to have a clear overview of what the group's objectives were, as information was presented in a cumulative and descriptive fashion, rather than being comparative and analytical. The groups have been asked to provide a one-page summary to outline their purpose and achievements. The new report format asks groups to review their work in terms of the plans they submitted

twelve months before, and to articulate their plans for the coming year. It is hoped that this new format will assist groups in focusing their attention on what they want to achieve, establish realistic timescales for these objectives and help them articulate their key topics and goals to the Senior Officers and Presidents.

The Secretariat believes this will also make it easier for Senior Officers to assess and allocate group funding, as there will be a clearer picture of the activity levels of the group and their funding needs. If it was felt that a group could improve the way it is functioning, then this new report format would allow Senior Officers to have a more focused discussion with group leads about what changes could be made.

*The proposed reporting form is on page 113.*

- **What should be the process for closing groups?**

It is not intended that groups be closed down unilaterally or without consultation, but the Secretariat recognises that there may be situations where a group is no longer viable or has completed the objectives it was set up to achieve.

The Handbook proposes that the ultimate decision for closing a group rests with its members. Senior Officers may consult with the group leads to support them in this, or may raise questions and ask for particular tasks to be carried out if a group appears to be struggling or needs to refocus its work. It is hoped that the new reporting format will help with making these conversations clear, beneficial and productive.

*Details of this section of the proposal are on page 109.*

The Secretariat would be grateful for Senior Officers' views on the points above and will incorporate feedback into the next draft of the Handbook.

## IARU Groups and Initiatives Handbook (Draft)

### Introduction

IARU promotes institutional joint working in various ways among member universities, such as inter-university networking, institutional learning and staff development. The groups and initiatives are a prime example of the ongoing collaborative work of IARU.

This Handbook is designed to distil the knowledge, experience and best practice of our groups and initiatives. We hope it will offer helpful tips on how to set up and run a group or initiative, provide information about how the group interacts with the Secretariat and the rest of IARU, and how to make the group's activities productive and valuable for its members.

For the sake of brevity, references to 'groups' also include 'initiatives', as the practicalities of groups and initiatives are similar.

We would like to keep the Handbook updated in response to any questions that might arise, so please do get in touch with any suggestions and queries.

Cambridge Secretariat  
[iaru@admin.cam.ac.uk](mailto:iaru@admin.cam.ac.uk)

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## 1. What is IARU and what does it do?

The International Alliance of Research Universities (IARU), established in 2006, is a network of eleven international research-intensive universities from nine countries across the globe. IARU member universities work together to address the major challenges of our time, to add value by providing opportunities to students and staff that would not arise otherwise, and to promote institutional joint working. The groups and initiatives are key elements of IARU's collaborative ethos.

### Where groups and initiatives sit within the structure of IARU

Within IARU, each university has a:

- President – the head of their institution. The Presidents meet annually for top-level, strategic discussions on issues relating to IARU and its members.
- Senior Officer – these are the operational decision makers of IARU who meet once a year to discuss IARU business matters.
- Key Contact – someone who acts as a point of contact for the Secretariat and can circulate IARU information within their own institution.

The Secretariat, based at the IARU Chair's university, is the administrative function of IARU.

The IARU groups and initiatives can involve individuals from IARU's eleven universities and facilitate cooperation on areas of joint institutional working. IARU currently has groups for subjects such as campus sustainability, alumni relations and HR. The initiative for Ageing, Longevity and Health is the sole research-focused initiative at the moment. Each university may have one or more representatives taking part in a group, and universities may choose to participate in all or some of the groups.

### The different types of groups and initiatives

Some groups are focused on joint working (producing reports, arranging conferences and working on projects etc.), while others concentrate on networking and sharing good practice. Groups are free to set their own work programme. They have to report their activities to the Senior Officers each year and they can request funding at these meetings, if their activities require it.

The groups allow members to exchange ideas on areas of common interest and obtain a global perspective on shared challenges, while the small membership of IARU means that it is easier to establish valuable and productive working relationships between like-minded institutions.

The current IARU groups and initiatives are:

Ageing, Longevity and Health Initiative  
Alumni Associations Network  
Cybersecurity Forum  
Gender Group  
Global Transformations Group

HR Consultation Group  
Librarians' Contact Group  
Lifelong Learning Working Group  
Real Estate Working Group  
Sustainable Campus Initiative  
Virtual Museum Tours Initiative

## 2. How to set up a new group or initiative

### Making a proposal

Initially, an area of interest would be identified by individuals at a member university (or universities). This could come about through discussion at the Presidents' or Senior Officers' Meetings, or through ongoing networking between IARU members in particular areas; there is no single fixed route for developing a proposal for a new group or initiative.

IARU members interested in setting up a new group are welcome to contact the Secretariat, as it can help identify others that may be interested by circulating information to the IARU Key Contacts.

If there is sufficient interest amongst members, a proposal can be submitted to the Senior Officers' Meeting via the Secretariat. The Senior Officers generally meet annually in the autumn, reviewing the activities of groups and deciding on funding requests.

The proposal should explain how the group would benefit IARU members and the value it would bring to the Alliance.

The proposal should include:

- An outline of the group's topics and aims, establishing whether the emphasis of the group would be on joint working, networking or sharing best practice.
- A brief workplan of the projects or discussion areas that it hopes to concentrate on in its first year.
- The types of meetings or events it might arrange, e.g. whether it would hold regular online meetings, in-person events, workshops etc. Some new groups have started with an initial workshop to gauge interest or to establish the direction of the group.
- Any funding requests. If planning is at an early stage, it may be that no funding request is made until the plans have progressed. A funding request would then be made to the Senior Officers, either at one of their future meetings or by circulation. Such requests should be made in good time so that they can be discussed in the context of the IARU budget.

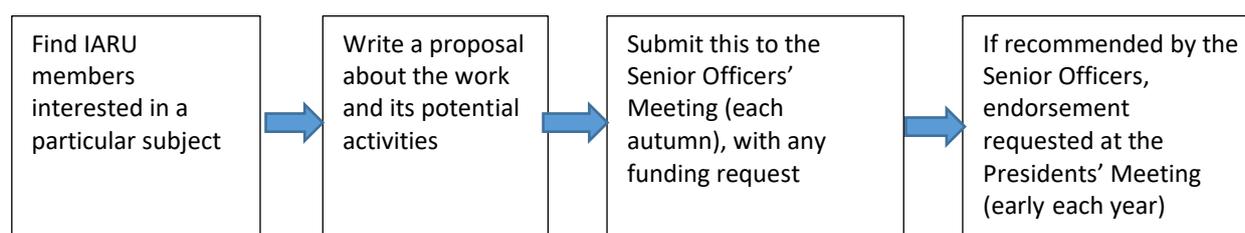
The Senior Officers would discuss the proposal (and make a decision on any funding request) and if they felt that it had merit, would recommend it for endorsement at the Presidents' Meeting (held annually in the few first months of the year).

Once the proposal had been accepted by the Presidents and the Senior Officers, the group would be established for an initial period of 3 years. During that period, the group would report annually to the Senior Officers' Meeting. These reports would also be presented at the Presidents' Meeting. At the end of the three year period, the Senior Officers would consider whether the group had achieved its aims and could therefore be wound up, or if it should continue for a further defined period.

IARU recognises that there will be differences in the productivity and outputs of groups due to their varying purposes and functions. If group members feel that the group's activities are beneficial, then there is no reason why a group cannot operate with just a few institutions as members. As with other groups, the funding approved by Senior Officers is likely to be proportionate to the type of activities being undertaken.

Occasionally, a new group or initiative could be proposed at the Presidents' Meeting first. When this has happened in the past, it is usually because the area has been discussed previously at a Presidents' Meeting, or because no funding request is being made, or plans are at an early stage of development. The expectation would be that a complete proposal would then go to the Senior Officers' Meeting for further discussion.

### Process summary



### What does a new group need to do first?

A newly established group should ensure that it covers the following points:

- Agree on a group lead or leads to coordinate the activities and decide if and when the positions should rotate around the membership of the group.
- Decide on the focus of the group, i.e. whether it plans to work on projects or concentrate on networking and sharing best practice.
- Agree specific goals and a workplan for the group's initial three year period; this should include proposals for their first year of activity, which will then be reported on at the next Senior Officers' Meeting.
- Decide on the frequency of meetings.
- Plan how to evaluate the progress and success of the group (the markers of success will vary from group to group, depending on its focus).
- Agree a process on how the group accepts new members or replaces departing members. Please note that universities may request to join groups after they are founded. The Secretariat can assist with contacting member institutions about group representatives.

### 3. Group activities over the year

#### Meetings

How often a group meets, and in what format, is a decision for the group itself. The group lead(s) will make the arrangements for meeting with the members directly, usually by email circulation. Many groups are now meeting a few times a year online but are also aiming for at least one face-to-face meeting per year. This may depend on the nature of the group, as those focused on networking and sharing best practice may not require as many meetings (especially face-to-face meetings).

#### Finances

Groups can submit budget requests for the coming year to the annual Senior Officers' Meeting. These funds are used to cover the costs of in-person meetings and hosting events (e.g. the ALH initiative conference), but may also be requested for wider group activities such as staff exchange, outreach work and cooperative education. Travel costs for individuals attending IARU meetings are to be met by individual institutions, rather than IARU.

The Secretariat provides budget request forms ahead of the meeting and the group lead(s) can set out the expected costs and the reasons for the request. Typically, groups request in the region of USD 10 – 15,000, depending on the nature of their work. The Senior Officers will then approve or reject the request, sometimes asking for amendments or further information if needed.

When making a funding request, the following information will be needed:

- Project name and year
- Total costs (including a breakdown of costs)
- Other financial resources (if applicable)
- List of participants
- Details of the project (background, purpose, expected outcomes, schedule, project's continuity etc.)

Funding should be spent on the activities the approval was given for. If a group wishes to change what it spends its funding on, then the request should be made to the Senior Officers (via the Secretariat) for approval by email circulation.

If the funding request is approved, the group will then report back at the next Senior Officers' Meeting on how the funds were used and the outcomes.

The approved funding is not transferred directly to the group. Groups should submit invoices to the Secretariat for expenses related to the budget request made to the Senior Officers. The Secretariat will then arrange reimbursement of group expenditure, up to the total amount approved by Senior Officers for that year. Please see 'Appendix 3: Reimbursement Guidance' for the information that the invoices should include.

#### Administration

In addition to the core work of the group, arranging meetings and overseeing financial matters, there will be a few administrative matters that the group lead(s) will need to manage. Most communication will be with the Secretariat, and the Secretariat will periodically request the following:

- A report in advance of the Senior Officers' Meeting (held annually around September/October). This report will cover the group's activities over the past year in terms of the agreed goals and workplan, highlight any decisions to be made and, where appropriate, set out the funding request for the year ahead. Groups can also add any additional papers (reports, publications etc.) if they think that this material would be helpful for the Senior Officers. These updates are also a good way to demonstrate the group's work to a wider audience, as their content will be adapted for inclusion in the twice-yearly IARU newsletter which is sent to all IARU members.
- Any requests for expense reimbursements. This must be received by the Secretariat by the end of the calendar year.
- An updated report in advance of the Presidents' Meeting (held annually in the first months of the year). This is very similar to the report for the Senior Officers' Meeting and will share (any) developments from the intervening months.
- Some groups may be offered the opportunity to deliver a presentation about their work to the Presidents' or Senior Officers' Meetings. The Secretariat also welcomes requests from individual groups to provide extended in-person updates to these meetings, if they think it would be beneficial. This is a great opportunity to engage with IARU's decision makers about aspects of the group's work which may benefit from high-level, cross-IARU discussion or would be of high-level interest to all IARU members.

### Working with the Secretariat

Throughout the year, the Secretariat may be in touch for updates about a group's contact information and information about the group for the IARU website etc. It can also provide help with promoting events and news on the website and social media channels. Groups may like to contribute to the IARU newsletter, as a way of showcasing their work to the IARU community or generate interest among potential new members.

If a group has any questions about how IARU works, the governance of a group or any other administrative matter, the Secretariat would be the first point of contact ([iaru@admin.cam.ac.uk](mailto:iaru@admin.cam.ac.uk)).

### Working with the Senior Officers

The annual Senior Officers' Meeting is a good opportunity to take stock of how a group is operating, what its future aspirations might be and whether the funding is adequate and being used efficiently. The Senior Officers may pose questions for the group or ask for additional information, especially in terms of how funding is spent, if it is not made clear in the report. If a group is struggling to recruit members, then bringing it to the attention of the Senior Officers is a good way to try to develop interest from other institutions. The Senior Officers may also provide additional feedback and advice on how the group operates, if they felt that it would be helpful.

### Leading a group

The leadership of a group is a decision for the group members, with some groups choosing co-chairs rather than just one leader. How often the leadership of a group changes is also down to the group members, although the model of leadership rotating between IARU institutions is encouraged (as with the IARU Chair).

Some thought should be given to how information is retained and passed on when the membership of a group changes. Minutes or brief notes of meetings are useful to record the discussions and to provide a basis for the reports to Senior Officers and Presidents. This information is also a useful resource for future group leads and members. The Secretariat can also assist with historical records and information from past group activities and membership.

## 4. What makes a group or initiative successful?

In May 2021, the Secretariat launched a survey of IARU members and this was one of the key questions. The groups all have different ways of working and their individual aims, however there are some common themes when it comes to the question of what makes a group run successfully.

The survey feedback highlighted the following as contributing to a productive and valuable group:

- **Clear planning** about the work programme and goals.
- **Committed leadership** in the group/initiative – if groups leads are active in setting up meetings, identifying areas for joint working and facilitating communication between the group members, this makes the group dynamic and effective.
- **Engaged members** – encouraging participating members to attend meetings regularly and make contributions towards the agreed goals and workplans. New groups should also be mindful that the time commitment of members is balanced with the value they derive from participating in the group. Group members typically do not receive additional remuneration for the time they spend working on IARU business and must fund their own travel expenses for IARU meetings.
- **Achieving a balance between virtual and face-to-face meetings** – survey feedback noted the value of meeting in person, although the ease of having more frequent virtual meetings is also an important consideration. We would also encourage groups to think about sustainability when planning the frequency of their in-person meetings.
- **Clear communication** with the Senior Officers.

## 5. Closing a group

From September 2022, it is proposed that new groups be established for an initial period of three years, after which the Senior Officers, in conjunction with the group leads, may decide that the group has achieved its original objectives and the group can close. If it is felt that there is additional work for the group to do, or that there is a value in the networking it provides, then the Senior Officers can approve its continuation for a further fixed period.

For existing groups, it is hoped that the new report form will be helpful for Senior Officers and group leads in discussing a group's objectives and purpose, and to understand when a group may have achieved its specific aims and can therefore be wound up. If approved, this would be the format of the reporting form for the annual Senior Officers' Meeting.

Alternatively, it may be that an existing group has changed its needs or has simply become unviable, for example if it is struggling to recruit enough members to make it worthwhile for others to continue to contribute their time to the group.

If a group falls into one of these categories, group members are encouraged to discuss the continuation of the group at one of their meetings as a first step. If the consensus is that the group should disband, this should be communicated to the Secretariat. The Secretariat will report this to the next Senior Officers' Meeting, along with a proposal of how any unspent funds should be dealt with (in consultation with the group leads).

In all cases, it is hoped that engagement and discussion will allow for a productive relationship between Senior Officers and the groups. If Senior Officers have concerns about the level of engagement of a group or the way in which it is operating, it would be expected that they could ask questions of the group and make suggestions for a way forward. Persistent concerns about the value being provided by a group may affect the willingness of Senior Officers to approve its funding requests. The decision about whether a group should continue, however, would ultimately rest with the group itself. IARU members are free to maintain informal, unfunded groups or networks if they wish.

## 6. FAQs

- **What does the Secretariat do?**

The Secretariat is the administration centre of IARU, organising the Presidents' and Senior Officer's meetings, handling IARU's financial matters, managing communication on decisions, news and requests across IARU. There may be additional project work taken on by the Secretariat to improve IARU's processes or establish new practices (e.g. launching the IARU newsletter). The institution of the President currently chairing IARU runs the Secretariat. Upon the election of a new IARU Chair (every 2 years), the role of the Secretariat also passes to the new Chair's institution.

- **How do I find new group members?**

Some groups will have representatives from all IARU institutions, whilst others have involvement only from some of the member universities. If you would like to find new members from across IARU for your group, please contact the Secretariat in the first instance. They will be able to put you in touch with the Key Contacts who can then circulate information about how colleagues at their institutions could become involved with the group.

- **When do I need to submit reports or funding requests?**

The Secretariat will contact you two to three months before the Senior Officers' Meeting (which is usually held in September/October) and send you a report template and a budget request form. It will also contact you one to two months before the Presidents' Meeting (usually held in the first few months of the year) for any updates to the previously submitted report for the Senior Officers' Meeting. To assist with planning, it should be noted that every second year, the Presidents' Meeting will be

held directly before the World Economic Forum at Davos (usually scheduled in mid-January).

- **Can a group lead or group member also be a Senior Office of IARU?**

Yes, a group lead or member can also hold the role of Senior Officer. However, as the Senior Officers decide on the budget requests from groups, the member in question would be required to declare their interest at the beginning of the Senior Officers' meeting and recuse themselves from the discussion of that group's budget.

- **Can a group change what it spends its IARU funding on?**

Any changes to what a group spends its approved funding on should be communicated to the Senior Officers via the Secretariat. Approval will then be sought from the Senior Officers by email circulation.

- **Our group hasn't spent all its allocated funding for the year – what do I do?**

Unspent funds may be carried over to the next year, with agreement from the Senior Officers. The request to carry over funds would be made to the Senior Officers Meeting, in the same way that the usual budget requests are made.

- **Where can I find more information about how IARU works?**

More information on the Presidents, Senior Officers, Key Contacts and other parts of IARU can be found [on the website](#).

- **How can I find out what other IARU groups there are?**

The IARU website has [a section on each of the groups and initiatives](#). The [newsletter](#) also contains updates from each group about their work over the last year.

## Appendix 1. Blank Status Report Form

### Name of Group or Initiative

<b>Lead</b>	<i>Name of group lead(s)</i>
<b>Reporting</b>	<i>Name of group lead or member reporting to the meeting</i>
<b>Items for decision</b>	<i>Please fill in if applicable</i>
<p><b>To assist the Senior Officers in understanding your group's work patterns and the goals you are hoping to achieve this year, we would be grateful if you could answer the following questions:</b></p>	
Summary of previous year's activities	<p><i>Please describe and assess the topics that your group has considered over the last year and/or projects that were worked on or completed.</i></p> <p><i>This summary should refer to the planned work outlined in your previous report to the Senior Officers' Meeting.</i></p>
What specific topics does your group hope to address in the coming year?	
Do you have projects that you hope to begin or continue? <i>(Please give details – the financial details of any planned projects can be set out separately in the budget request form)</i>	
How often do you plan to meet (approximately)?	
Funding to date	<i>Summary of previous funding allocations – this content can be provided by the Secretariat</i>

	<p><i>E.g.</i></p> <p><i>USD 13,500 (2020)</i></p> <p><i>USD 10,000 (2018)</i></p> <p><i>USD 10,000 (2017)</i></p> <p><i>USD 5,000 (2016)</i></p> <p><i>USD 3,300 (2015)</i></p>
<p>Participants List</p>	<p><i>So that the Secretariat can keep its records updated, please list the group members, their institution and their email address.</i></p>

## Appendix 2: Blank Funding Request Form

Please fill in the following form to make a funding request.

### Project Name/Year:

### Total Requested Amount & Breakdowns:

Item	Amount
Item 1	USD
Item 2	USD
Item 3	USD
<b>Total Requested Amount</b>	USD

\*Groups will be asked to report on how funds were used in next year's report for the Senior Officers' Meeting.

### Other Financial Resources (if applicable):

### Project Participants List (Please specify the lead by adding "Lead" next to the name):

University	Title/Position	Name
ANU		
ETH Zürich		
NUS		
PKU		
Berkeley		
Cambridge		
UCT		
Copenhagen		
Oxford		
UTokyo		
Yale		

\*The list does not need to be complete in case not all participants are confirmed yet.

### Details of the Project (background, purpose, expected outcomes, schedule, project's continuity, etc.):

## Appendix 3: Reimbursement Guidance

### Guidance on Submitting Invoices to the Secretariat (2022)

We hope that this guidance will be helpful when it comes time to submit invoices for reimbursement. Funds will be paid in US dollars and the Secretariat will cover the transfer fee. If you have any questions, please feel free to email us at [iaru@admin.cam.ac.uk](mailto:iaru@admin.cam.ac.uk)

#### When to Submit Your Invoice

- Please remember that it is only possible for us to provide reimbursements against approved expenditure for 2022 (i.e. unused funds cannot be rolled over to 2023 unless approval is received from the Senior Officers).
- **All invoices must be submitted before 31 December 2022.** Invoices will take at least 2 weeks to process. Invoices received in December 2022 may not be paid until late January 2023, due to Cambridge's Christmas-New Year closure. Therefore, if payment is required before the end of the calendar year, please let us know and submit the invoice by **14 November 2022**.
- Invoices should be emailed to the Secretariat: [iaru@admin.cam.ac.uk](mailto:iaru@admin.cam.ac.uk). Please do not post invoices.

#### Preparing Your Invoice

- If staff at your university have undertaken expenditures for more than one IARU group/initiative, you can submit either a single itemised invoice for all IARU-related expenditures or separate invoices.
- Please ensure that your invoice is addressed to the University of Cambridge (i.e. *not* the IARU Secretariat), using the following details:

Dr Karen Kennedy  
Strategic Partnerships Office  
The Old Schools  
University of Cambridge  
Trinity Lane  
Cambridge, United Kingdom CB2 1TN

- Please ensure that your invoice contains the following information:
  - ✓ An itemised list of expenditures, where applicable. The list can be submitted as a separate document if that is easier.
  - ✓ The amount in both your local currency and in US dollars
  - ✓ Beneficiary account name, account number, address and country
  - ✓ Bank name, bank branch, address and country
  - ✓ ABA Routing Number (US only), Sort Code (UK only), BSB (Australia only)

- Finally, please note that the account needs to be held in the name of your university. Reimbursements to non-university accounts will need the owner of the account to be set up as an approved supplier in Cambridge's financial system, and that will take additional time.

## 9.2 Education Initiatives Committee

*The Secretariat will report on this proposal and the paper below is included for background information.*

### Proposed IARU Education Committee

#### Introduction

IARU currently has several concurrent educational initiatives:

- IARU Courses
- Joint Online Courses (JOC)
- Joint Education Programme (JEC)
- Global Transformations Summer Field Course
- Global Internship Programme

It is the task of the Secretariat to keep track of these initiatives, ensure communication between their leads, the Senior Officers, and member universities, and to provide advice and support where appropriate.

There has never been a single, permanent individual or group tasked with thinking about IARU's educational initiatives as a whole. The Secretariat's many other administrative responsibilities and its two-year duration can complicate this task, especially for an incoming Secretariat.

Moreover, global student exchange has recently become more difficult. Student exchange numbers dropped by around 30% after Santander's funding for the Global Summer Programme ended in 2018–19. The costs of in-person exchange discourage many students from participating, and some countries are impacted more than others. Since then, each university has been able to promote up to four courses within the programme and these are listed as IARU Courses on the IARU website, but these courses typically lack characteristics that make them specific to IARU. Then, in 2020–21, the pandemic made in-person exchange impossible for many students.

In light of recent experience, and the increasing focus on sustainability and new online/blended formats, the time feels right to step back and consider IARU's educational offering as a whole and how it could be strengthened.

#### The Committee

To help ensure that IARU's educational initiatives are effective and appropriate, the Secretariat proposed to the Senior Officers in 2021 that an education committee be formed. The proposal was

supported. The need for a central group focused on education had also been endorsed at the 2019 Senior Officers' Meeting (*Outcomes*, p.6).

The Secretariat suggested that the committee could perform the following valuable functions:

- Look to the future and make suggestions for new educational initiatives as appropriate. For example, the 'virtual classrooms' initiative as set out in the Senior Officers' Meeting 2021 Tome (p.16).
- Provide a single, ongoing point of communication and coordination for IARU on educational matters. In particular, the committee would help ensure that individual initiatives are aware of what else is happening in terms of education within IARU, thereby identifying opportunities for cooperation that could save time and effort.
- Maintain up-to-date knowledge of IARU's educational offering as a whole – how it is working, where it is providing value and suggesting, as appropriate, whether specific initiatives require additional support or would benefit from potential changes.
- Create a forum for those involved to identify, and work on, common problems and opportunities.
- Provide the IARU community with a place where institutional memory (past problems, solutions and strategies) can be held for sharing with new colleagues and future Secretariats.
- Reduce the vulnerability of individual educational initiatives, when managed entirely by a single institution, to disruption or cessation due to internal changes.

The committee could also be asked to spend time on subjects of general relevance to IARU's educational work, including identifying a potential new source of funding for student exchange (cf. the support of Santander prior to 2018).

In summary, the aim of the committee is to facilitate existing work and formulate proposals for new educational initiatives. As such, the committee would cooperate with existing educational initiatives – it would not exercise oversight, or seek to control or instruct them. Indeed, it is hoped that individuals directly involved in running these existing initiatives will be part of the committee. The committee would look to deliver genuine value for those involved, not to create an additional layer of bureaucracy.

## **Membership**

Membership would be open to anyone (academic or professional) who has been or is involved in IARU educational initiatives, or educational exchange and related fields more generally.

The priority would be to recruit members from universities currently most interested/active in student exchange and educational initiatives within the Alliance, ideally to have as wide a representation as possible. Those who were previously involved in the Global Summer Programme could also be asked,

as this could build upon pre-existing relationships. Senior Officers and Key Contacts will also be consulted. In order for the committee to be an effective working size, in line with other IARU groups, we anticipate that there would ordinarily be no more than one representative from each IARU university, though this may change if some universities do not end up being represented on the committee.

The University of Copenhagen has kindly agreed to spearhead the organisation of the committee.

### **Expectations**

- In cooperation with the Chair/Secretariat, and relevant individual members, the committee would establish a work plan (objectives, priorities, timelines) for the next 1–2 years based on the responsibilities outlined in this document.
- Meet as appropriate.
- Produce a report on IARU education initiatives for the Senior Officers' Meeting. This report would chart plans and progress on the priorities.

The time commitment would vary depending on the committee's workload and how it decides to work. As an initial estimate, it would be sufficient for members to commit about half a day a month, but this could increase with time or vary between members.

### **Funding**

- The committee could apply for funding if it wishes to meet in person once a year.

## 9.3 Early-Career Collaboration Grants Scheme (Revised)

*For discussion and decision by the Senior Officers. Submitted by the Secretariat.*

### Background

At last year's online Senior Officers' Meeting, the Secretariat proposed a funding scheme to foster new research collaborations amongst IARU members. Under this scheme, financial support would have been provided to researchers at different IARU universities to meet and work together to develop a formal research programme and then apply for external funding. Senior Officers were generally not supportive of this proposal because:

- It was felt that the amount of funding IARU could offer (up to US\$5,000) per application would be too little to be effective
- Researchers do not have difficulty in identifying potential research collaborators, and there was some worry that the initiative could be perceived as an attempt to seed collaborations in a top-down fashion
- There was a significant risk that the funding would not eventually lead to a fruitful collaboration

Senior Officers stressed that a vast amount of research is already taking place between members. They were of the opinion that the most effective use of IARU's resources would be to support existing research collaborations in new ways.

More than one attendee suggested focusing on early-career researchers. The proposal was therefore redeveloped into a proposal to fund research stays at other IARU universities for postdoctoral researchers. This revised proposal was then shared at the Presidents' Meeting in May at Cambridge. The Presidents supported it and suggested two further changes:

- to focus on junior academics, rather than postdoctoral researchers. It was felt that, among early-career researchers, postdoctoral researchers are more mobile than junior academics and therefore less able to engage in, and encourage, longer-term collaborations between IARU institutions. Exact details would, however, be left to Senior Officers to decide.
- to double the funding earmarked for the scheme in its first year from USD 20,000 to 40,000.

The Secretariat would now like to get the input of Senior Officers on all aspects of the proposal as it has been revised since the Presidents' Meeting, specifically on the following questions, with a view to running the grant scheme for the first time in 2023.

For ease of reference, each question has also been repeated at the relevant part of the proposal text.

### Items for Decision

1. **Do SOs want to have the scheme open to all 'early career researchers' (that is, including postdoctoral researchers), or to limit it to junior academics?**
2. **Depending on the answer to Question 1:**

- a. **Do SOs agree that ‘early career researcher’ can be defined as someone who has submitted their PhD within 10 years of the time of application?**
  - b. **How do SOs want to define ‘junior academic’?**
3. **Are there any concerns about allocating USD 40,000 to the scheme in its first year of operation (2023–24)?**
  4. **How do SOs think that applications should be selected?**

### **Early-Career Collaboration Grants Scheme Overview (Revised)**

The COVID-19 pandemic has made it very difficult for researchers to travel and engage in in-person research. While the last two years have demonstrated the possibilities and value of virtual collaboration, in many cases there is no substitute for in-person presence. Spending time at other institutions can provide invaluable access to expertise, equipment and facilities, as well as providing new perspectives and approaches.

The loss of this connectivity has been particularly acute for early-career researchers as they work to develop new research projects, acquire experience, and build their professional networks. Connections made at the start of a researcher’s career can have a formative effect on their professional development and have the potential to generate long-term collaborations.

The Early-Career Collaboration Grant Scheme aims to help early-career academics meet the costs of a short-term placement at another IARU university during which they would work with other researchers, and benefit from expertise and/or facilities and equipment not available at their home institutions.

### **Eligibility**

Current early-career researchers – defined as those within 10 years of submitting their PhD – at any IARU university can apply. All placements must be at another IARU university. The host university does not need to already be involved in the applicant’s research project.

**Question 1:** *Do SOs want to have the scheme open to all ‘early career researchers’ (that is, including postdoctoral researchers), or to limit it to junior academics?*

**Question 2:** *Depending on the answer to Question 1:*

- a. *Do SOs agree that ‘early career researcher’ can be defined as someone who has submitted their PhD within 10 years of the time of application?*
- b. *How do SOs want to define ‘junior academic’?*

### **Funding and Eligible Expenses**

Individuals could apply for a total of US\$5,000. IARU would earmark US\$40,000 for the scheme each year.

Subject to the presentation of receipts to the Secretariat, applicants would be reimbursed for the costs of travel, accommodation, maintenance and other expenses related to their placement.

**Question 3:** *Are there any concerns about allocating USD 40,000 to the scheme in its first year of operation (2023–24)?*

### Application Requirements

Note: Applicants must confirm that they have secured the necessary approvals from both their home and host institution, before applying to the scheme.

Applicants should submit the following to the IARU Secretariat:

- 1) A covering letter (absolute max 1,000 words) setting out, in plain English:
  - The area of their research and their specific research project
  - Why they are seeking the placement (i.e. additional/different expertise, equipment, facilities etc.)
  - An outline of their plans to share information about their research and their placement at their host institution (for example, at departmental seminars or other relevant research meetings).
  - How they expect their research placement will facilitate further collaborative links between their home institution and host institution (e.g. reciprocal exchanges, joint funding applications)
- 2) A CV (strictly no more than two pages long)

At the end of their placement, researchers will be asked to write a short statement explaining their research, what they accomplished (including any joint publications, for example), how they collaborated with colleagues, and how their placement has or is expected to further additional collaboration.

### Selection Criteria and Process

There are a variety of possible factors that could be taken into account when deciding which applicants to select.

One key question is whether academic merit should be considered when assessing applications. Senior Officers are asked to consider if they, or a panel comprising academics from different disciplines and different universities, would have sufficient time and collective expertise to assess the relative academic merit of applications with sufficient rigor to justify it being a key selection factor.

If Senior Officers conclude that the selection process cannot realistically include a meaningful assessment of relative academic value, there remains the question of what other criteria should be used. The aim of the scheme is to help early-career researchers forge links between IARU institutions, both directly and through the encouragement of future links. As such, it is suggested that two key selection criteria could be:

- The importance of the placement for the completion of the applicant's wider research project

- The applicant's explanation of how the placement will encourage new collaborative links or strengthen existing ones

However, other selection criteria might include some or all of the following, as determined by the Senior Officers:

- Whether the project involves work that was in some way impacted or delayed by the pandemic
- Whether it is connected to the work of IARU groups with existing or potential research links (the Ageing, Longevity & Health Group and the Sustainable Campus Initiative for example).
- Whether it would take place between universities that are not in the same country/geographic region, in recognition of the greater financial obstacles to in-person collaboration between these institutions (e.g. between the University of Copenhagen and the National University of Singapore, or between the Australian National University and Yale University).

As a final alternative suggestion, Senior Officers may simply choose to award grants randomly among all those applicants who, in the view of the Secretariat, meet the basic criteria for the scheme.

***Question 4. How do SOs think that applications should be selected?***

### **Decision Process & Timeline**

If Senior Officers approve this proposal, and after any further changes have been made to its details, applications will open in early Spring 2023 and close at the end of Summer 2023.

The Secretariat will vet the applications for basic eligibility before successful applicants are chosen through the process determined by the Senior Officers.

Successful applications will be announced at SOM 2023.



INTERNATIONAL ALLIANCE OF  
RESEARCH UNIVERSITIES

## **Session 10: IARU Business Matters**

- 10.1 Scheduling of meetings
- 10.2 Rotation of Chair
- 10.3 Financial report
- 10.4 Financial planning and membership fees
- 10.5 Agenda for PM 2023, ETH Zurich
- 10.6 Date and host for SOM 2023 and PM 2024

## 10.1 Scheduling of meetings

*For discussion and decision by the Senior Officers. Submitted by the Secretariat.*

There has been some past informal discussion about whether to hold the Senior Officers' Meeting directly before the Presidents' Meeting. The Secretariat wishes to give the Senior Officers the opportunity to discuss the issue and decide if it is an arrangement that would benefit IARU members.

### Benefits

- One of the benefits would be a reduction in the number of journeys generated by these meetings. For some members, this could be a more efficient use of time, in terms of travel (especially if travelling long haul) and also the preparation time for the host and Secretariat.
- There would also be a cost saving for institutions in having to fund fewer journeys to the meetings, if they were combined.
- It would also be significantly more environmentally sustainable than multiple trips for separate meetings.
- It may also allow for increased interaction between the Presidents and Senior Officers, if they are meeting at the same venue for consecutive meetings.

### Disadvantages

However, there are a number of disadvantages to consider in holding the meetings back-to-back.

- Firstly, it concentrates all the face-to-face contact for IARU members into a single week and for Senior Officers, their in-person interaction would be reduced from twice to once a year. It also increases the risk of losing momentum on projects if they are only discussed at meetings once a year. As there is a currently a gap of a few months between the meetings, this creates the opportunity for plans and proposals to be revisited, updates to be provided and new suggestions to be made without having to wait a whole year.
- Groups and initiatives would only receive feedback from the Presidents and Senior Officers once a year. This could lead to a lack of engagement and mean that groups would be less likely to receive guidance and feedback at other times of the year. Input from Senior Officers may still be given via email circulation, but this may not replicate the attention that an in-person Senior Officers' Meeting can give.
- Making the meetings consecutive would also create a very uneven workload for the Secretariat, as the organisation of these meetings represents a large part of its activities. The meetings would also need to be organised simultaneously, which would be a significant burden for a Secretariat. It may be that the overall amount of work would be less, but it would be concentrated into a single period and may therefore be beyond the capacity of a regular two-person Secretariat team. One way of mitigating this would be to make all the Presidents' Meetings into one-day events (as when hosted at ETH Zürich), although this may it harder to justify the travel in non-Davos years.

- There is also the consideration that if the consecutive meetings were held in January (as the Presidents' Meeting is to be aligned with the World Economic Forum at Davos on alternate years), then for those universities that observe Christmas, work on the meetings would be disrupted by the holiday period.
- For Senior Officers who may also be attending the Presidents' Meeting afterwards, it would be a major time and energy commitment, as the two meetings together would span 5 days, not including travelling time. There would also be no real opportunity to brief the Presidents about the discussions at the Senior Officer's Meeting, nor would there be time to prepare papers or discussion items that the Senior Officers may wish to put before the Presidents.

## 10.2 Rotation of Chair and Secretariat

*For discussion and decision by the Senior Officers. Submitted by the Secretariat.*

As IARU does not have a permanent administrative centre, the Chair and Secretariat serve a two-year term and so a substantial amount of time and effort needs to be invested in preparing and delivering a successful transition to a new Secretariat. This current system has been functioning well, but the current Secretariat would like Senior Officers to consider whether to extend the term of the Chair and Secretariat to three years to further improve efficiency.

There is a lot of detail of which a new Secretariat needs to be apprised and it represents a considerable amount of work, both for the outgoing and incoming teams. In effect, five months is taken up with the new Secretariat learning the role and becoming familiar with historical discussion and decisions (c. three months) and then training and handing over to a new team at the end of the term (c. two months).

The value in rotating the role of Chair and Secretariat is that it connects with the ethos of IARU as a collaborative organisation. Serving in these roles allows members to gain first-hand experience of understanding the issues currently facing IARU, have a deeper insight into the groups and initiatives, and have the opportunity to work on projects that they would like to undertake during their tenure. On the other hand, a longer term would give greater stability and efficiency, as there would be a longer period in which the Secretariat could be effective before having to work on the transition. An extension to three years would seek to balance these aspects without fundamentally changing the nature of the rotating Secretariat.

It is worth noting that although the recent convention is for Secretariats to serve two years, in the past some Secretariats have served slightly longer terms (e.g. ANU in 2005–2008 and NUS in 2009–2012). Moreover, clarifying the standard term length for a Chair and Secretariat would be helpful to institutions in their planning.

**The Secretariat would like Senior Officers to discuss and decide if there is a value in changing the length of tenure for the Chair and Secretariat. If Senior Officers are in favour of this change, the proposal will be put to the IARU Presidents at their next meeting.**

### Benefits

- The Secretariat would have a longer period of time in which to be active and carry out projects/proposals. All the administrative processes have to be learnt afresh by each Secretariat, in addition to gaining familiarity with previous topics of discussion and understanding how to best support the groups and initiatives. At the end of a Secretariat's tenure, efforts currently have to be diverted from projects and administration to teaching the incoming Secretariat during the transition period.
- If the Secretariat had a longer period in which to build up knowledge and experience, it would also be in a better position to add value, make suggestions and improvements and propose (and carry out) new areas of work. This would enable members to think creatively about how to approach the roles of Chair and Secretariat and allow them to have a lasting impact on the operation of IARU.

- A longer tenure would allow the Secretariat to work more efficiently during its term. This is especially true of the organisation of the Presidents' Meetings and Senior Officers' Meetings, as the Secretariat team would have the advantage of using its accumulated knowledge in arranging these detailed events. The host institutions would also have the benefit of working with a more experienced Secretariat in delivering the meetings.

### **Disadvantages**

- Although a three-year period would allow the Secretariat more time to be effective, it should be recognised that existing staff will need to divert their time onto IARU matters for longer, and time may be needed to recruit a new staff member to assist with coordinating the tasks. A three-year term may also have added complications for office space and facilities.
- The increased time commitment may deter Presidents from taking on the role of Chair. However, this could be mitigated as the extent of the Chair's workload can be decided by the President serving in the role. Consideration also needs to be given to the impact on the Senior Officer of the Chair institution, as they work more directly on operational matters and would have a leading role in three Senior Officers' Meetings and make a major contribution to three Presidents' Meetings, under the new proposal.
- One option that has been previously discussed is the possibility of different lengths of tenure for the Secretariat and Chair. Currently one institution provides both the Chair and Secretariat team and this offers particular advantages, especially in the planning of the meeting agendas and developing new proposals. This would be harder to manage if the Chair institution was different to the Secretariat university.
- An additional implication to reflect upon is that ETH Zürich, which has kindly offered to host the Presidents' Meeting on alternate years to align with the World Economic Forum at Davos, may have an increased workload. If ETH Zürich was serving as Secretariat, and depending on how the dates fell, it may be in the position of both organising and hosting two Presidents' Meetings in three years. However, as the Presidents' Meetings directly before Davos tend to be shorter, this may not be too much of a concern.

## 10.3 Financial Report

### IARU Income & Expenditure Statement

1 January 2022 – 1 August 2022

	max amount	Total (USD)
<b>Carried forward from 31 December 2021</b>		<b>460,552</b>
<b>INCOME</b>		<b>200,000</b>
Members' contribution	200,000	
<b>Total available funds</b>		<b>660,552</b>
<b>EXPENDITURE</b>		
<b><u>Meetings</u></b>		<b>14,423</b>
Presidents' Meeting 2022	14,423	
		<b>19,134</b>
<b><u>Running Initiatives</u></b>		
ALH Conference	1,417	
Global Internship Program	2,428	
Virtual Museum Tours	15,289	
<i>PKU (expected)</i>	<i>2,000</i>	
<i>UCPH</i>	<i>2,175</i>	
<i>ETH</i>	<i>6,114</i>	
<i>UTOK (expected)</i>	<i>5,000</i>	
<b><u>Secretariat costs</u></b>		
Contribution to Secretariat costs at Cambridge	80,000	<b>49,455</b>
<i>IARU domain renewal (5 years), hosting for IARU archive</i>	<i>780</i>	
<i>Staff Costs (projected)</i>	<i>46,248</i>	
<i>Miscellaneous</i>	<i>2,427</i>	
<b>Total Expenditure</b>		<b>83,012</b>
<b>BALANCE</b>		<b><u>577,540</u></b>
Total available funds	577,540	
Total expenditure	83,012	

## Projected Commitments 2022

Projected until 31 December 2022

	max amount	Total (USD)
<b>Carried forward from 01 August 2022</b>		<b>577,540</b>
<b>PROJECTED EXPENDITURE</b>		
<b><u>Meetings</u></b>		
Senior Officers' Meeting 2022 (in-person)	15,000	<b>15,000</b>
<b><u>Running Initiatives</u></b>		
ALH Conference	15,000	
Gender Group Meeting (2022)	8,000	
Global Transformation	3,500	
<i>Global Transformation Group Meeting</i>	<i>3,500</i>	
Virtual Museum Tours	16,400	
<i>OXF</i>	<i>7,200</i>	
<i>PKU</i>	<i>5,000</i>	
<i>UTOK</i>	<i>2,000</i>	
<i>NUS</i>	<i>2,200</i>	
<b><u>Secretariat Costs</u></b>		
Contribution to Secretariat Costs	up to 80,000 in total	<b>22,955</b>
<b>Total Expenditure</b>		<b>80,855</b>
<b>BALANCE</b>		
Total available funds	496,685	<b>496,685</b>
Total expenditure	<b>80,855</b>	

## Projected Expenditure 2023

	max amount	Total (USD)
<b>Carried forward from 31 December 2022</b>		<b>496,685</b>
<b>INCOME</b>		<b>200,000</b>
Members' contribution	200,000	
<b>Total available funds</b>		<b>696,685</b>
<b>PROJECTED EXPENDITURE</b>		
<b>Meetings</b>		
Presidents' Meeting 2023 (in-person)		<b>45,000</b>
Senior Officers' Meeting 2023 (in-person)	<i>30,000</i>	
	<i>15,000</i>	
<b>Running Initiatives (pending decision at SOM 2022)</b>		
		<b>224,500</b>
ALH Conference	15,000	
Cybersecurity Forum 2023 (carryover)	10,000	
Early Career Collaboration Grants	40,000	
Gender Group Meeting (2022)	8,000	
Global Internship Program	22,000	
Global Transformation	28,000	
<i>Borderland Field Course</i>	<i>20,000</i>	
<i>Global Transformation Publication</i>	<i>5,000</i>	
<i>Global Transformation Group Meeting</i>	<i>3,000</i>	
Librarians' Contact Group (carryover)	10,000	
Lifelong Learning Group	14,000	
Real Estate Working Group	20,000	
<i>Annual Meeting (carryover plus additional funding)</i>	<i>12,500</i>	
<i>REWG Website Development and Updates</i>	<i>2,500</i>	
<i>Staff Development and Exchange Program</i>	<i>3,000</i>	
<i>Annual Report, Publications and Toolkit Development</i>	<i>2,000</i>	
Sustainable Campus Initiative	37,500	
<i>SCI Officers' Workshop – UCT (carryover)</i>	<i>15,000</i>	
<i>Scope Three Carbon Emissions Project (carryover)</i>	<i>7,500</i>	
<i>Future of Joint SCI &amp; Real Estate Project</i>	<i>15,000</i>	
Virtual Museum Tours	20,000	
<b>Secretariat Costs</b>		
		<b>80,000</b>
Contribution to Secretariat Costs	Up to 80,000	
<b>Total Expenditure</b>		<b>349,500</b>
<b>BALANCE</b>		<b>347,185</b>
Total available funds	696,685	
Total expenditure	<b>349,500</b>	

## Alumni Associations Network

*(Own funds resulting from a positive balance from the World Alumni Forum held at UTokyo in 2015)*

	max amount	Total (USD)
<b>INCOME</b>		
Balance of 1 <sup>st</sup> World Alumni Forum		10,000
<b>Total available funds</b>		<b>10,000</b>
<b>EXPENDITURE</b>		
Contribution to the 2016 Presidents' Panel		2,500
Total Expenditure		<b>2,500</b>
<b>BALANCE</b>		
Total available funds	10,000	<b>7,500</b>
Total expenditure	2,500	

## 10.4 Financial Planning

*For discussion by the Senior Officers. Submitted by the Secretariat.*

### Background

Due to the disruption caused by the Covid-19 pandemic, many IARU activities, particularly those related to travel, were either cancelled or postponed during 2020–22. Many of the IARU groups and initiatives were unable to spend the funds that they had previously been allocated and instead had to request to carry over funding. In addition, the Presidents' and Senior Officers' Meetings were held online, which also had a significant effect on the IARU budget. As a result, IARU funds currently have a surplus.

### Current position

On 1 January 2022, the balance of the IARU account was \$460,552 and as of 1 August 2022, it currently stands at \$577,540.

Many of the groups were still operating solely online in the first half of 2022, but some in-person meetings are now starting to be held and more are planned for the second half of 2022. The Presidents' and Senior Officers' Meetings have also been able to go ahead in person this year.

As activities increase, some of the surplus that has built up will be spent and so it is expected that the balance will return to more normal levels.

### Considerations

It is becoming apparent that some of the changes enforced by the pandemic have had longer lasting effects on some activities, for example:

- Application numbers for the Global Internship Program have been reduced during the pandemic and have not yet fully recovered.
- Some IARU groups may continue to conduct the majority of their meetings online, to save money and time, and also for environmental reasons.
- As institutions reassess their travel priorities and expenditure, the size of delegations attending the Presidents' and Senior Officers' Meetings has been smaller.

### Additional costs

- During the pandemic, the Virtual Museum Tours initiative was initiated and new funding was allocated to the project. The VMT initiative is continuing to run and could be granted further funding. So far, the impact of operating VMT alongside groups at full capacity (with normal travel etc) has not yet been observed and this will become clearer over the next year.

- At PM 2022, the proposed Early Career Collaboration Grants were discussed and, as the Presidents were keen to support this initiative, they recommended that the funding be doubled to \$40,000.
- If additional groups or initiatives are proposed, it may be that additional funding is needed to cover their activities.

## Projected costs

As it is currently unclear whether travel for meetings, in particular, will return to pre-pandemic levels, the Secretariat has considered the effect on the budget based in terms of two different scenarios.

### *Operating at full capacity*

For SOM 2022, the total of funding requests is \$349,500 (see Financial Report for the breakdown of this total). This includes carry over funding requests from groups, new requests for funding. The funding for the Secretariat, Presidents' Meeting and Senior Officers' Meeting are fixed and come to \$125,000. The projected figures below show that if this funding was used to its full extent, then the balance of funds at the end of 2023 would be \$347,185.

Projected balance on 1 January 2023:	\$496,685
Membership dues	\$200,000
Total available funds:	\$696,685

Total of initiative funding requests at SOM 2022:	\$224,500
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Secretariat, PM and SOM costs	\$125,000
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Projected balance on 31 December 2023: \$347,185

For comparison, the total funding requests for groups and initiatives in the last four Senior Officers' Meeting were:

<b>SOM</b>	<b>Group/initiative funds requested</b>	<b>Secretariat, PM &amp; SOM costs</b>	<b>Total requested funds</b>	<b>Actual expenditure reported at SOM</b>
2021	\$154,700	\$125,000	\$279,700	\$2,780
2020	\$121,500	\$125,000	\$246,500	\$90,000
2019	\$131,000	\$125,000	\$256,000	\$105,608
2018	\$43,355	\$125,000	\$168,355	\$147,324

### *Operating at reduced costs*

The Secretariat have also looked at what the budget implications would be if groups and initiatives only utilised half their requested funding. It is assumed that the Secretariat costs are fixed and that the Presidents' and Senior Officers' Meeting would be held in person, so these items would still utilise all of their requested funding.

Balance on 1 January 2023:	\$496,685
Membership dues	\$200,000
Total available funds:	\$696,685
Half of funding requests at SOM 2022:	\$112,250
Secretariat, PM and SOM costs	\$125,000
<u>Projected balance on 31 December 2023:</u>	<u>\$459,185</u>

### **Future spending and membership fees**

The difference between the two scenarios is that if all groups and the administration spend all available funding, this exceeds the total contribution of membership dues by almost \$150,000 and would start to use the surplus that has been built up.

In the more conservative scenario, the projected expenditure is closer to the budget of the membership dues.

If future expenditure regularly tends towards full capacity, so that this surplus is used up, there will be significant pressure on IARU funds by 2025–26. By contrast, if spending is more in line with the reduced costs projection, then the budget is more sustainable and will stay relatively stable (see figure 1).

It should be noted that the actual expenditure is usually lower than the projected expenditure as usually the Presidents' and Senior Officers' Meeting do not use all the available funds, and certainly in recent years, groups and initiatives have not spent all their allocated funding (mainly due to Covid-19 disruption).

Depending on how expenditure changes over the next few years, Senior Officers may wish to consider limiting the funding of new initiatives or assess whether to make any changes to the membership dues.

It should also be noted that groups could potentially request up to \$20,000 (depending on their activities) and if all groups did this (and Secretariat, GIP costs etc remained the same), then the maximum theoretical annual expenditure would be \$387,000 (see figure 2).

The issue of membership dues was discussed at fairly recently at PM 2019, when it was proposed that the fees be raised from \$18,181 to \$20,000, following the expiration of the Banco Santander funding. This proposal was rejected at the meeting and the amount has remained the same. As a consequence, there may be little appetite to revisit this question or to raise the fees significantly.

### **Proposal**

Given the considerations outlined above, the Secretariat proposes to review spending over the next year, in relation to the changing working patterns of IARU and report back at SOM 2023.

Senior Officers can then consider how activities and meetings (and the subsequent funding implications) are operating and decide if any changes need to be made in the future.

**Figure 1**

**Projected spending 2022–2026**

*Full capacity expenditure (based on amounts requested at SOM 2022)*

	<b>Balance at year start</b>	<b>Membership dues</b>	<b>Available funds</b>	<b>Estimated expenditure during year</b>	<b>Balance at year end</b>
2023	\$496,685	\$200,000	\$696,685	\$349,500	\$347,185
2024	\$347,185	\$200,000	\$547,185	\$349,500	\$197,685
2025	\$197,685	\$200,000	\$361,552	\$349,500	\$48,185
2026	\$48,185	\$200,000	\$282,185	\$349,500	-\$101,315

*Reduced costs expenditure (based on groups and initiatives spending half the amounts requested at SOM 2022)*

	<b>Balance at year start</b>	<b>Membership dues</b>	<b>Available funds</b>	<b>Estimated expenditure during year</b>	<b>Balance at year end</b>
2023	\$496,685	\$200,000	\$696,685	\$237,500	\$459,185
2024	\$459,185	\$200,000	\$659,185	\$237,500	\$412,685
2025	\$421,685	\$200,000	\$621,685	\$237,500	\$384,185
2026	\$384,185	\$200,000	\$584,185	\$237,500	\$346,685
2027	\$346,685	\$200,000	\$546,685	\$237,500	\$309,185

*Mid-range costs expenditure (based on amounts requested at SOM 2019)*

	<b>Balance at year start</b>	<b>Membership dues</b>	<b>Available funds</b>	<b>Estimated expenditure during year</b>	<b>Balance at year end</b>
2022	\$496,685	\$200,000	\$696,685	\$112,250	\$486,552
2023	\$486,552	\$200,000	\$686,552	\$112,250	\$512,552
2024	\$512,552	\$200,000	\$712,552	\$112,250	\$538,552
2025	\$538,552	\$200,000	\$738,552	\$112,250	\$564,552
2026	\$564,552	\$200,000	\$764,552	\$112,250	\$590,552

**Figure 2**

**Theoretical Maximum Expenditure Each Year**

*Administration*

President's Meeting	\$30,000
Senior Officers' Meeting	\$15,000
Secretariat	\$80,000

*Groups & Initiatives*

Alumni	\$20,000
Sustainable Campus	\$40,000
Cybersecurity	\$20,000
Librarians	\$20,000
Real Estate	\$20,000
Gender	\$20,000
ALH	\$20,000
HR Consultation	\$20,000
Lifelong Learning	\$20,000

*Other*

Global Internship (2,000 each)	\$22,000
Global Transformation Programme	\$20,000
Virtual Museums	\$20,000

**\$387,000**

## **10.5 Suggestions for the agenda for PM 2023, ETH Zurich**

The Senior Officers are invited to suggest new proposals, topics for roundtable discussions, specific agenda items or subjects which they feel the Presidents would be interested in hearing about from an external speaker.

*No paper*

## 10.6 Dates and hosts for SOM 2023 and PM 2024

### Senior Officers' Meeting 2023

The list below sets out the IARU members that have hosted a Senior Officers' Meeting in the past. Although UCT have not hosted yet, 2023 is likely to be a busy year for them with taking on the position of Chair and Secretariat, and they are a potential host for the Presidents' Meeting in 2024.

As PM 2022, SOM 2022 and PM 2023 have or will be hosted in Europe, the Secretariat would like to suggest a non-European member to host the Senior Officers' Meeting in 2023.

Previous Senior Officers' Meeting hosts by year:

2022: Oxford  
2021: Online  
2020: Online  
2019: ETH Zürich  
2018: Tokyo  
2017: Yale  
2016: PKU  
2015: Copenhagen  
2014: NUS  
2013: Berkeley  
2012: Cambridge  
2011: ANU  
2010: ETH Zürich  
2009: Oxford  
2008: Berkeley  
2007: ETH Zürich  
2006: Yale

### Presidents' Meeting 2024

One of the key elements of the 2023 Presidents' Meeting has been to reactivate the decision to align the Presidents' Meeting with the World Economic Forum at Davos. As a result, the 2023 meeting will be held at ETH Zürich.

The Secretariat would like to propose that UCT be given the option to host the 2024 Presidents' Meeting (as it had been discussed as a potential host for the 2023 meeting) if convenient for the university. If UCT would prefer not to host in 2024, the Secretariat would be grateful for offers to host from other IARU members.

Previous Presidents' Meeting hosts by year:

2022: Cambridge  
2021: Online

2020: Online  
2019: ETH Zurich  
2018: PKU  
2017: ANU  
2016: Oxford  
2015: Tokyo  
2014: ETH Zürich  
2013: NUS  
2012: Copenhagen  
2011: Yale  
2010: PKU  
2009: Cambridge  
2008: Yale  
2007: ANU  
2006: NUS



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# **Appendix 1: PM 2022 Confirmed Outcomes and updated actions**

## PM 2023 Confirmed Outcomes and updated actions

### Session 2: Regional round up

- As part of the Presidents' regional round up, the University of Tokyo proposed discussing characteristics of world class universities, particularly in terms of governance.

Action: The Secretariat is liaising with Tokyo to see how they would like to take this forward.

### Session 3: Maintaining connectivity while reducing our carbon footprint

The outcomes of this session focused on the sharing of best practice and resources between institutions, particularly on the following:

- Creating principles or categories around essential travel.
- Facilitating digital interactions, with a focus on shared standards.
- Creation of carbon budgets.
- Sharing experience around off-setting and how to create genuine off-sets.
- Building materials and technologies, acknowledging that the building industry can be slow to adapt and considering whether there are approaches to address this.
- Sharing investment strategies across institutions.

The Secretariat will facilitate the sharing of these materials.

Action: The Secretariat has contacted the Sustainable Campus Initiative as a first step to establish what is already being shared, so we can work out what could be shared and identify who would be the best person at each institution to receive and supply the information.

### Session 4: Mentoring for successful academic careers

Following the presentation on building a successful mentoring culture by Professor Tan and Associate Professor Lum (NUS), the following outcomes were noted:

- Associate Professor Lum (NUS) asked how feasible it would be to establish a mentoring programme across IARU and how best practice could be shared amongst members.
- The possibility of hybrid roles split between academia and industry was discussed, with the Presidents debating the proportion of time spent in each role, the difficulties around intellectual property and the need to make salaries competitive.
- Some of the Presidents shared details of what had worked well with their own mentoring schemes, noting the challenges of scalability and changing existing institutional cultures.
- As this debate raised many issues, NUS offered to reflect on the discussions and questions

and provide a written response including potential next steps to the other Presidents, via the Secretariat.

Action: having provided these notes to NUS, the Secretariat has circulated their response and will provide whatever assistance is then needed/possible to take matters forward.

### **Session 5: What does it mean to be a global alliance in an age of growing nationalism and regionalism?**

- The Presidents acknowledged that international engagement had become more complicated, and that universities needed to develop an informed, strategic approach to manage global collaboration in the face of emerging political barriers.
- The Presidents valued the open discussion and agreed that the conversations should continue, drawing on each other's experience and support.
- A key concern of many IARU universities was how to manage interactions with Russia, given the current war in Ukraine.

Action: Secretariat to reach out to SOs with a suggestion that universities share, as desired, procedures they have in place in terms of Russia.

### **Session 6: IARU Group Presentations**

- The success of the Ageing Longevity and Health Initiative was noted and the Presidents felt that it was important to build on this achievement. The Secretariat will be developing a case study of the initiative to see what can be learnt from ALH's example for future research initiatives.

### **Session 7: The future of work**

In addition to sharing best practice, approaches and experience about hybrid working and teaching, these outcomes were agreed:

- There was great interest in UCT's online high school and, in partnership with UCT, the Secretariat will share information with IARU institutions about this scheme.
- The subject of transforming digital pedagogy is an important consideration for all IARU members and the Secretariat will reflect on how to take this discussion forward, with initial discussion on how to approach this at the Senior Officers' Meeting in September 2022 if possible.
- Oxford has developed 'News Ways of Working', a guidance framework which it offered to share with IARU members.

#### Actions:

1. Secretariat to facilitate sharing of approaches, strategies. Oxford already offered to share its 'New Ways of Working' guidance framework.
2. Secretariat to share information about UCT's online high school with members.

## **Session 8: IARU Chair and Secretariat 2023-25**

- Professor Toope confirmed that all the IARU Presidents had approved the proposal for the Cambridge Secretariat to continue until spring 2023, with the new interim Vice-Chancellor, Dr Anthony Freeling, serving as IARU Chair for that time.
- Professor Mamokgethi Phakeng of UCT was unanimously elected IARU Chair for 2023–25, with UCT acting as Secretariat for the same period.
- The Cambridge Secretariat will liaise with their counterparts at UCT to organise the transition in due course.

## **Session 9: IARU Business Matters**

### **9.1 IARU membership**

- After discussion, it was agreed that, subject to a suitable candidate being found, an invitation to join IARU could be extended to a university from Latin America, a geographical area not currently represented by the alliance.
- The Secretariat will form a working group to identify potential candidate institutions.
- IARU members will have the opportunity to suggest universities for consideration, perhaps supported by information from their respective International Offices and Latin American Studies departments.
- The criteria for selection proposed by the Secretariat were approved by the Presidents who confirmed that global university rankings should be used as a guide, rather than the key criterion.
- It was agreed that after consideration of a Latin American university, there would be no further plans to expand for 5 years.

Action: The Secretariat has set up a working group, and has solicited information from all SOs about which Latin American universities IARU members have the most engagement.

### **9.2 Summaries of Groups and Initiatives**

- The Secretariat will check that all member universities are represented in the Cybersecurity Forum and will encourage the Forum to feedback to the Presidents on their activities, as this is currently an important area for IARU members.

Action: The Secretariat liaised with the Cybersecurity Forum with regard to representation from each IARU member.

- To improve the reporting process and for wider communication, the Secretariat will contact group leads and ask them to complete a summary template.

Action: Alongside the usual reporting for the Senior Officers' Meeting, the Secretariat has asked group leads to write/revise a short (one page) description of what their group does and what its aims are.

- The Presidents decided that budget for individuals to travel to annual group meetings (as opposed to budget for the groups to meet the costs of setting up these meetings) should continue to come from individual institutions, rather than central IARU funds.

Action: Secretariat to report back to the group/person in question.

- On the subject of collaborative alumni events, the Presidents commented that this could be difficult to carry out in practice and that they would be open to suggestions from the Alumni Associations Network about other ways in which the IARU universities could work together in this area.

Action: Secretariat to report back to the Alumni Association Network.

#### **9.4.4 Committee on education initiatives**

- Several of the Presidents were wary of introducing an additional layer of administration to the education initiatives. Additionally, they were concerned that it would be seen as imposing top-down control of initiatives that were already functioning well.
- It was agreed that UCPH (who have volunteered to lead on this) should contact the relevant IARU group leads to gauge the need and appetite for such a committee.
- The proposal would also be amended to clarify that the role of the committee would focus on providing support and coordination, instead of exercising oversight.

Action: The Secretariat has amended the proposal and has begun consulting IARU members.

#### **9.4.5 Early career funding**

- It was agreed that the proposal should be focused on junior academics, rather than exclusively postdocs.
- There was also agreement that the initial budget should be doubled to raise the profile of the scheme.
- The Presidents agreed that the possibility of matched funding should be a matter for internal discussion by individual institutions.
- The details of the funding scheme will be worked on by the Secretariat and Senior Officers.

Action: The Secretariat has revised the proposal and submitted it to SOM 2022.

#### **9.5 Host and date of PM 2023**

- The Presidents have been asked to hold the dates of 15–16 January provisionally, pending the announcement of the 2023 dates for the World Economic Forum at Davos.

- Secretariat will monitor the preparations for Davos 2023 and will contact IARU members to confirm or adjust the PM 2023 dates accordingly.

Action: Following an update on the Davos 2023 schedule, the Secretariat has finalised the date of PM 2023 as 14–15 January and has confirmed this with the Presidents.



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## **Appendix 2: IARU Calendar**

## IARU Calendar

### Meetings and activities 2022

<b>Date</b>	<b>Event</b>	<b>Host</b>
12 May	Real Estate Working Group Meeting	Virtual
23–25 May	Presidents' Meeting	Cambridge
July	Global Transformation Group Meeting	NUS
Late summer	Cybersecurity Forum	ETH Zürich
August	Gender Group Meeting	Copenhagen
19–21 September	Senior Officers' Meeting	Oxford
19–21 October	ALH Annual Graduate and Research Conference	Copenhagen
TBC	Sustainable Campus Initiative Meeting	UCT
TBC	Real Estate Working Group Meeting	UCT
TBC	Real Estate-Sustainable Campus Initiative Joint Conference	UCT

### 2023

14–15 Jan	Presidents' Meeting 2023	ETH Zürich
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## **Appendix 3: Participants' Biographies**

## Australian National University



**Mr. Jonathan DAMPNEY (Key Contact)**

*Director, ANU International Office*

As Director of the Australian National University International Office, Jonathan provides leadership in establishing and implementing university global engagement priorities. Jonathan provides strategic advice on international engagement to the university executive and is responsible for coordinating global engagement across the university. He also manages key university partnerships, including membership of the International Alliance of Research Universities (IARU) and Association of Pacific Rim Universities (APRU). Jonathan holds a Bachelor of Advanced Science (Honours) from the University of Sydney and a Graduate Diploma in Science Communication from the ANU.

## ETH Zürich



**Dr. Jürg BRUNNSCHWEILER (Senior Officer)**

*Chief of Staff to the President*

Jürg Brunnschweiler is the Chief of Staff to the President of ETH Zurich and heads the Office of the President. The Office of the President provides strategic and operational services to advance ETH Zurich and the President's vision and priorities. It is comprised of teams that are responsible for coordinating and promoting activities in the areas of Foresight and Strategic Affairs, Sustainability, International Affairs, and Global Visibility.

Jürg Brunnschweiler joined ETH Zurich in 2002. Before becoming Chief of Staff to the President on 1 January 2020, he worked first in the Presidents' Staff and the Lecturers' Office, then in the office dealing with the European Union Framework Programmes and in 2009 returned to the Office for Faculty Affairs where he was responsible for faculty recruiting procedures at various departments. In addition, he was contact person for academic career advancement and Secretary of the Tenure Committee. In 2012, Jürg Brunnschweiler took the helm of ETH Global, the former staff unit for international relations at ETH Zurich. He is a member of the Global Advisory Board and the Board of Directors of the ETH Alumni Association. Jürg Brunnschweiler holds a PhD in Biology from the University of Zurich.

## National University of Singapore



**Associate Professor WONG Reuben (Senior Officer)**  
*Associate Vice President (Global Relations)*

Appointed Associate Vice President (Global Relations) in January 2021, Reuben Wong is also an Associate Professor at the College of Alice & Peter Tan (CAPT) and the Department of Political Science in the National University of Singapore. The founding Director of Studies (2012-19) in CAPT, Reuben has been a CAPT Resident Fellow since 2019. He held the first Jean Monnet Chair (European Integration and Foreign Policy) in Singapore, with a grant from the European Commission (2013–16). He teaches interdisciplinary modules in CAPT, international relations in Political Science, and is a NUS Teaching Academy Fellow.

A former diplomat, Reuben was First Secretary in the Singapore Embassy in Paris (1995–1998). After Paris, he pursued an M.Phil in European Politics at the University of Oxford, and a PhD in International Relations at the London School of Economics (LSE) on an NUS Overseas Graduate Scholarship. His publications include *The Europeanization of French Foreign Policy* (Palgrave Macmillan, 2006), *National and European Foreign Policies* (Routledge, 2011), and journal articles on the politics of disability, and the European Union (EU) in international politics.

He has held visiting positions at the University of Cambridge (2005), the LSE (European Institute, 2008), the Stimson Center (Washington DC, 2009) as a Fulbright Fellow, the East Asian Institute (Singapore, 2011), and Humboldt University (Berlin, 2014). Reuben is an Associate Fellow at the EU Centre Singapore, Senior Research Affiliate (EU-China programme) at the College of Europe in Bruges, and sits on the Singapore International Foundation's Board of Governors. Reuben researches, consults and gives media interviews on EU foreign policy, disability inclusion, and Singaporean politics. He speaks French, Chinese and elementary Spanish, and raises four children to help arrest Singapore's declining population.



**Mr. ONG Randall (Key Contact)**  
*Associate Director (Alliances & Networks), Global Relations Office*

Randall Ong is the Associate Director (Alliances & Networks) at the National University of Singapore Global Relations Office (NUS GRO). He manages, oversees, develops and strategizes NUS' participation in university alliances such as ACU, APRU, AUA, AUN, ASAIHL, IARU, SATU, U21 and UAiTED. The Alliances & Networks team promotes NUS' global presence through various initiatives and activities that affirm and strengthen the university consortia members' shared objectives of excelling symbiotically in academic, research and entrepreneurial exchanges. Randall was formerly the Associate Director (Eastern Europe, Central Asia, Middle East & Africa) at NUS GRO. He has led in innovating and managing many university-wide global programmes for students. Notably, he conceptualised and developed the NUS Study Trip for Engagement and EnRichment (STEER) programme in 2010. [STEER](#) facilitates cross-cultural awareness and adaptability, and nurtures global academic excellence and professional development amongst students.

Randall has facilitated numerous G-to-G inbound faculty members' and students' programmes. Having managed donor stewardship and administered numerous student grants/exchange awards, he has worked closely with ministries, governmental bodies, embassies, trade agencies and MNCs.

At the Office of the Vice-President (University and Global Relations) in NUS previously, Randall expanded and implemented NUS' engagement strategies and internationalization plans with the Middle East and Latin America. These initiatives included collaborative initiatives between NUS schools/faculties and Middle Eastern/Latin American universities/tertiary institutions and research centres.

Randall graduated with a Master of Science (Economics) from the School of Oriental and African Studies, University of London in 1992. He has worked in the Ministry of Community Development as a Senior Manager, Sentosa Leisure Group as an Associate Director overseeing various Learning and Organisational Development initiatives. Randall was a lecturer at Nanyang Polytechnic where he taught Economics & Statistics and Community Development Management modules.

In his leisure time, he is a voracious reader of non-fiction literature, especially biographies. Randall is also an aviation enthusiast, where soaring to new heights never ceases to fascinate him literally and metaphorically in life.

## Peking University



**Dr. LI Yun (Senior Officer)**  
*Deputy Director of Office of International Relations*

Dr. Li Yun is Deputy Director of Office of International Relations of Peking University (PKU). She received the BA and MA from the School of International Studies, PKU and then Ph.D. in Management of Higher Education from the Graduate School of Education, PKU.

Dr. Li has been working at the Office of International Relations since 2006. She is responsible for the exchange programs with European partners and is the coordinator for IARU affairs at Peking University. From April 2018, she has also been the Chief for Office of General Affairs of Institute of Area Studies.

## University of California, Berkeley



**Prof. Lisa ALVAREZ-COHEN (Senior Officer)**  
*Vice Provost for Academic Planning*

Lisa Alvarez-Cohen is the Vice Provost for Academic Planning at UC Berkeley, as well as the campus Senior International Officer. She began serving in this role in 2018.

She is the Fred and Claire Sauer Professor, past-Chair of the Department of Civil and Environmental Engineering and past Chair of the Faculty Senate at UC Berkeley. She received her Bachelor's Degree in Engineering and Applied Science from Harvard University and her M.S. and Ph.D. in Environmental Engineering and Science from Stanford University.

Her research areas include biotransformation and fate of environmental water contaminants, environmental microbiology and ecology, bioremediation, biological wastewater nutrient removal, and application of molecular and isotopic techniques for studying environmental microbial communities. She teaches both undergraduate and graduate courses in environmental microbiology, environmental engineering, and biological process engineering, and has co-authored the textbook *Environmental Engineering Science*. She is a fellow of the American Academy of Microbiology and a member of the National Academy of Engineering. She has won a number of awards including the China 1,000 Talents National Award, the ASCE Simon W. Freese Environmental Engineering Award, the W. M. Keck Foundation Award for Engineering Teaching Excellence, and the National Science Foundation Young Investigator Award.

PhD - Environmental Engineering and Science, Stanford University  
MS - Environmental Engineering and Science, Stanford University  
BA - Engineering and Applied Science, Harvard University

## University of Cambridge

### IARU Secretariat



**Dr. Karen KENNEDY (Senior Officer)**  
*Director of the Strategic Partnerships Office*

Karen is Director of the University of Cambridge's Strategic Partnerships Office. The Strategic Partnerships Office provides expertise and support to the University's key partnerships and relationships, across disciplines and across the public and private sectors.

The focus is on partnerships that further the University's academic activity and align with university priorities. These partnerships could be with a wide variety of entities, including public sector and private sector, other universities, research bodies, governments, companies, businesses, and trusts. Karen joined the University in July 2018 from the National Cancer Research Institute, where she had been Director since 2013. She has previously worked in strategic relations and programme management for research funders and scientific institutions, including Genome Canada and the Wellcome Trust. She holds a PhD in medicinal chemistry, and conducted post-doctoral research in France and at the Babraham Institute in Cambridge.



**Ms. Renata SCHAEFFER**  
*Head of Public International Partnerships, Strategic Partnerships Office*

Renata Schaeffer is Head of the Public International Partnerships section within the Strategic Partnership Office at the University of Cambridge. She is responsible for developing institutional relationships with higher education and research institutions, governments, funders and NGOs internationally.

In her previous role Renata was the Assistant Director for International & EU Matters in the Research Office at Cambridge, where she led the EU & International, Global Challenge Research Funds & ODA activity and the Due Diligence teams within the Research Office, overseeing Cambridge's international research grant portfolio, both operationally and at policy and strategic level.

Renata is an active member of the League of European Research Universities (LERU), which has played a key role in Horizon 2020 and Horizon Europe negotiations, a member of the UKRO focus group for Horizon 2020 and has acted as an advisory member of the European Commission at various user groups. More recently Renata has also been involved in developing the University's research funding strategy post-referendum. Renata is a member of the ARMA International Working Group and the African Academy of Sciences Mentorship Scheme.

Previously, between 1995 and 2001, Renata worked in finance at Daimler-Chrysler in Istanbul.



**Dr. Rob SING**  
*Research Analyst, Strategic Partnership Office*

Rob Sing is the Research Analyst for the Public International Partnerships team within the Strategic Partnerships Office at the University of Cambridge. Rob previously worked in the History Department at Cambridge and in the UK Civil Service, serving in both the Cabinet Office and the Department of Transport as a Policy Advisor. Prior to this, he completed a PhD in Classics at Cambridge in 2017.



**Ms. Hannah FLEWITT (Key Contact)**  
*International Projects Coordinator, Strategic Partnerships Office*

Hannah Flewitt is the International Projects Coordinator in the Strategic Partnerships Office, primarily working on IARU Secretariat matters.

Previously, Hannah worked in the higher education development sector, as Deputy Director of Development and Alumni Relations at Hughes Hall, one of the graduate colleges of the University of Cambridge.

In addition, she has experience in the arts event management sector and has worked for a Cambridge-based spin-out tech company. Hannah graduated from the University of Cambridge with an MA and MPhil in Music.

## University of Cape Town



**Ms. Carolyn NEWTON (Senior Officer)**  
*Director, Global Engagement, Research Office / Office of the Vice-Chancellor*

Carolyn Newton's role as director of global engagement is focused on raising the international profile of the University of Cape Town, advising and supporting the UCT Vice-Chancellor and the Executive on a range of issues related to global strategy and visibility, and leading a team dedicated to increasing the university's global profile through the selection and brokering of strategic international partnerships, communication and marketing of the university's research and internationalisation efforts, and the use of research data to inform executive decisions.

Ms Newton graduated from the University of Cambridge with an MPhil in Criminology, from the University of Stellenbosch with a BA (Hons) in Journalism, and from the University of Cape Town with a BA in English. She has worked as a journalist, writer and editor in a range of media and academic publishing houses in South Africa and the UK, and in sixth-form education in Oxford before returning to Cape Town and her alma mater, UCT, in 2013, where she began to work in research communications and, increasingly, international partnerships.

She is a member of the steering committee for the university network U7+, the steering committee for the newly launched platform Nature Africa, and sits on the advisory committee for the Times Higher Education Impact Rankings.

## University of Copenhagen



**Ms. Hedvig GYDE THOMSEN**

*Head of International Strategic Partnerships & Alliances, Rector's Office*

The International Strategic Partnerships & Alliances team facilitates the strategic direction and co-ordinates UCPH's priority partnerships and alliances, among which are IARU, LERU, 4EU+ Alliance. Hedvig Gyde Thomsen has more than 15 years of experiences within international education, and has a broad knowledge in the field of international partnerships. Hedvig has headed several strategic projects pertaining to the University's current strategy *Talent and Collaboration, 2023*, among these, the 2023-project for the development of international priority partnerships.

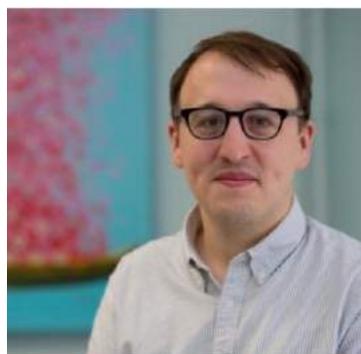


**Ms. Tobi Line Marie DANSTRØM EGELUND (Key Contact)**

*Rector's Office*

Tobi Line Egelund is Academic Officer at the Rector's Office, and key contact for IARU and the priority partnerships of the university. She joined the International Strategic Partnerships and Alliances team at the start of May 2022.

## University of Oxford



**Mr. Andrew BROWN (Senior Officer)**

*Senior International Officer, International Engagement Office*

Andrew Brown is a Senior International Officer at the University of Oxford. In addition to leading the University's International Engagement Office, Andrew advises Pro-Vice-Chancellor Professor David Gann on international strategy and helps coordinate activity across Professor Gann's portfolio of Development and External Affairs. Prior to joining Oxford, Andrew worked in the Global Engagement Office at University College London, where he was responsible for the University's partnerships in the Asia-Pacific.

## The University of Tokyo



**Professor KITAMURA Yuto**  
*Professor, Graduate School of Education*

Yuto Kitamura is a Professor at the Graduate School of Education and a Director of the Center for Advanced School Education and Evidence-Based Research at the University of Tokyo. He received his Ph.D. in Education from the University of California, Los Angeles (UCLA). He had worked as an Assistant Education Specialist at UNESCO in France and taught as an Associate Professor at Nagoya University and Sophia University in Japan. He was a Fulbright Scholar at the George Washington University, a Visiting Professor at the University of Dhaka in Bangladesh, and has been serving as a Special Advisor to the President of the Royal University of Phnom Penh in Cambodia. He is currently a Member of the Board of Education in the Tokyo Metropolitan Government and an Associate Member of the Science Council of Japan.

He specializes in comparative education and has conducted extensive research on the education policies of developing countries, particularly in Southeast Asia. His recent publications include: *Education in Japan: A Comprehensive Analysis of Education Reforms and Practices* (co-editor, Springer, 2019) and *Memory in the Mekong: Regional Identity, Schools, and Politics in Southeast Asia* (co-editor, Teachers College Press, 2022).



**Ms. TOYOKI Makiko**  
*Assistant Manager, International Strategy Group, Management Planning Department*

Ms. Makiko Toyoki joined International Strategy Group, Management Planning Department of the University of Tokyo in April 2020.

Prior to her current position, she has worked as academic affairs staff at the University's Graduate School of Humanities and Sociology, advising students on degrees and studying abroad, in addition to experiences working outside the University.

She has also previously worked on IARU matters in 2012 during her first stint in the international department of the universities administration bureau.



**Ms. OGUCHI Mao**  
*Administrative Staff, International Strategy Group, Management Planning Department*

Ms. Mao Oguchi joined the International Strategy Group, Management Planning Department of the University of Tokyo in April 2022 on her return from the US where she was taking part in the Ministry of Education, Culture, Sports, Science and Technology's staff development program.

Her first post as an administrative staff in the University of Tokyo was in the Planning and Public Relations Team of the University Entrance Examination Group. She worked on promoting the university to prospective students.

## Yale University



**Mr. Donald L. FILER (Senior Officer, Key Contact)**  
*Associate Vice President for Global Strategy*

Donald Filer has overall responsibility for Yale's Office of International Affairs (OIA), which he has led since its creation in 2004. OIA provides administrative support for the international activities of the schools, programs, and individual faculty across the university. These efforts focus on supporting the development of new projects with partner universities, coordinating the work of other Yale offices during project start-ups, managing visits to Yale by university delegations and other dignitaries, and safeguarding Yale's reputation around the world.

Mr. Filer also leads the university's emergency response in the event of a medical emergency, natural disaster, or civil unrest taking place abroad, and oversees the Yale Young Global Scholars Program, and Yale's Marketing and Trademark Licensing Office.

He joined Yale University in 2000 as Associate Secretary with responsibility for managing support for the Yale Corporation (the university's governing board), supervising the Yale Visitor Center, and directing the Office of Licensing Programs. Prior to his appointment at Yale, he served in a number of capacities at Connecticut College in New London, Connecticut, from 1991 to 2000 including Vice President for Community and Public Affairs, Secretary of the College, and Acting Vice President for Development. He worked for former U.S. Representative Bruce A. Morrison of New Haven from 1985 to 1991. Mr. Filer earned a B.A. in political science from Colgate University.