



UMBC

STRATEGIC INTERNATIONAL PARTNERSHIPS AND GLOBAL ENGAGEMENT

SUBCOMMITTEE CHARGE

- Gather data on existing collaborations, partnerships and agreements
- Examine programs at other institutions that help to track and leverage international partnerships
- Articulate objectives for strategic international partnerships
- Identify opportunities as well as barriers to successful partnerships
- Produce report with final recommendations/goals

GUIDANCE FROM ACE

Establishing and managing successful collaborations and partnerships abroad is a key aspect of internationalization for many institutions. Such relationships can provide international experiences for students and faculty, enhance the curriculum, generate revenue, and raise the visibility of institutions at home and around the world. ACE recommends a 4-step approach for creating and managing international partnerships:

- **Step 1: Strategic planning.** Partnerships and collaborations should be based on a careful planning process that clarifies international goals and objectives, particularly with respect to student learning outcomes. International collaborations should align with overall institutional mission and priorities, and should take into account availability of financial and personnel resources.
- **Step 2: Review possible structures.** International collaboration can take many forms, and institutions should become familiar with a variety of options before talking to potential partners. Some modes of engagement will likely emerge as a better institutional fit than others; some may be rejected outright, and others may only be appropriate for partners that meet certain criteria.
- **Step 3: Identify potential partners.** It is important to analyze the higher education context in target countries, including policies, priorities, structure, and operations. A careful analysis can eliminate certain types of institutions as potential partners and make others a higher priority. Peer institutions in the U.S. can provide useful information on potential partners abroad, and conferences often include opportunities for direct networking with institutional representatives from other countries.
- **Step 4: On-going management.** As partnerships proliferate, institutions may find themselves with too many MOUs – often of varying scope and effectiveness. Another common situation is for partnerships based on a personal connection to dissipate once that connection is no longer active. Centralized coordination, engaging a broader base of faculty support, and designating certain relationships as “strategic” can help mitigate these issues.

TYPES OF INTERNATIONAL AGREEMENTS

1. Agreements of Intentionality. These agreements are general “handshake” or “umbrella” agreements intended to document intentions for future collaborations. They may be issued at the university, collegiate or departmental level. While the forms of these agreements differ, what they all have in common is they do not explicitly commit University Resources to the partnership and they typically require additional Agreements of Implementation in order to execute specific activities. Agreements of Intentionality are most appropriate when all parties are clear on the intentions of the proposed partnership and either the proposed partnership cannot move forward without a formalized agreement, such as a funding agency requiring evidence of collaboration, or a public signing of the agreement serves a greater public relations or diplomatic purpose. Agreements of Intentionality include:

- **Letter of Intent (LOI):** An official document intended to inform select constituents that there is sufficient interest to pursue some type of collaboration in the future. The LOI is appropriate when faculty from two or more institutions need to demonstrate an initial commitment to collaborating on specific activities in order to apply for a grant or other award.
- **Memorandum of Understanding (MOU):** A written statement of understanding between UMBC and a foreign university, government, non-profit organization or other entity expressing a mutual intention to engage in a cooperative academic or research effort that does not involve a commitment of University Resources.

2. Agreements of Implementation. These agreements refer to specific activities and specify the terms of their implementation, often including commitments of University Resources, as agreed to by all parties. Such agreements may be issued at the university, collegiate or departmental level. While specific Agreements of Implementation may vary in name and scope, what all of these agreements have in common is a commitment of resources by one or more parties. As such, the preparation of these agreements is often more lengthy, and their review more rigorous, than simple Agreements of Intentionality. Such agreements include:

- **Affiliation Agreement (AA):** An agreement to affiliate with a foreign university, government, non-profit organization or other entity to provide access to training, facilities, equipment or other resources in furtherance of UMBC’s mission. Examples of AAs include, but are not limited to internships, research projects, service-learning and other applied learning experiences offered in collaboration with a foreign entity.
- **Memorandum of Agreement (MOA):** A written agreement or contract between UMBC and a foreign university, government, non-profit organization or other entity that entails a commitment of one or more University Resources for academic, research or other purposes as approved by designated signatories. Examples of MOAs include, but are not limited to exchanges of students, scholars, researchers and/or staff of UMBC and the foreign entity, exchange of academic or other research information and materials by the parties, or the organization of joint conferences and/or symposia.

TYPES OF PARTNERSHIP ACTIVITIES



- ### TEN SUCCESSFUL PRACTICES FOR MANAGING MOUS
1. General agreements are signed only when absolutely necessary.
 2. Standard institutional templates exist, have been developed with legal counsel, and have the following components:
 - a. Clearly articulated purpose
 - b. Duration, expiration, and terms for renewal
 - c. Responsible parties
 - d. Severability clauses
 3. The institution is willing to work with a partner institution's templates, if necessary, to avoid an adversarial tendering process.
 4. Negotiation and implementation occurs at appropriate levels according to institutional governance and standards (e.g., review and development does not occur in a vacuum and does not get lost in bureaucracy).
 5. Signature and ratification occur at appropriate levels according to institutional standards or governance.
 6. Review of specifics occurs by appropriate authorities and stakeholders (e.g., graduate/post-graduate mobility is reviewed by graduate school deans).
 7. Stewardship and facilitation of review occurs and is timely; the process is documented and responsibilities are clear.
 8. The office or unit responsible for stewardship and facilitation has clear information about institutional standards and expectations for agreement development and conducts outreach to internal and external stakeholders as appropriate.
 9. Clear and searchable records are kept regarding all agreements (active, expired, or cancelled) using institutional standards for data collection and record retention.
 10. Agreement originals are retained according to institutional archiving principles. ■

THE COST/RESOURCE EQUATION

Adequate support to develop and sustain partnerships is essential; resource availability, therefore, must be a key factor in formulating a partnership plan. The organization may need to, for example, invest in staffing, especially for time-intensive activities such as student exchanges; allocate funding for travel assistance to help faculty and staff foster relationships with partners; or develop new grants, fellowships, and scholarships that incentivize program development or participation in activities with partners.

It is important to consider not only the institution's existing investment, but also the level of commitment moving forward. Is the institution likely to increase or reallocate resources at a level sufficient to accomplish goals? Conversely, could the goals be met—wholly or partially—without additional resources?

In some cases, additional capacity and resources might be realized through a careful examination of current practices and reorientation of institutional priorities (e.g., reorganization of existing offices, or reallocation of internal funds). If fundraising or identification of other external funding sources are likely to be required, however, it is useful to investigate possible sources and determine initial target amounts during the strategic planning process.

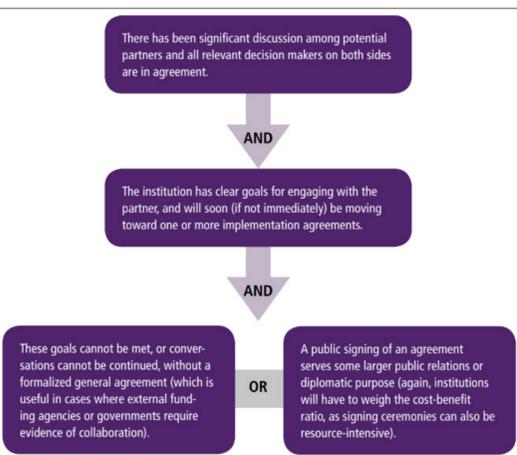
HOSTING 101: GOOD PRACTICES FOR DELEGATION MANAGEMENT

Hosting delegations from partner institutions is a routine practice—both at the start of new relationships and periodically as they develop.

Delegation hospitality is a shining example of an area in which U.S. institutions have much to learn from counterparts abroad. Those who work in international education understand it is common for institutions around the world to provide airport greetings and ground transportation, cover hotel and other in-country travel costs, take gift protocol quite seriously, organize signing ceremonies, arrange for high-level meetings, and showcase the cultural assets of their community.

Reciprocation by U.S. institutions is an important way to build rapport with the partner institution and demonstrate respect for cultural norms. When partner representatives come to campus, the following steps can help ensure a successful and productive visit:

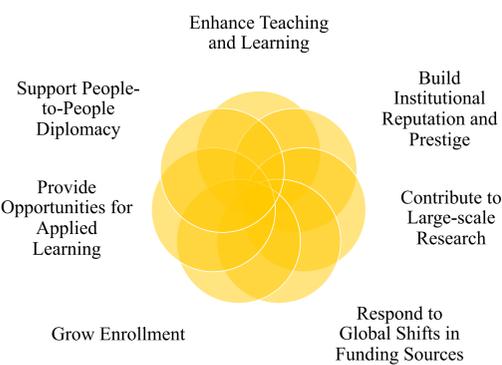
- Collaborate with contacts at the partner institution, formulate a detailed agenda, and share it with the incoming delegation in advance of the visit.
- Handle as many logistical details for the visitors as your institution allows. This may require some level of financial support to provide ground transportation and lodging.
- Arrange a meeting with the highest-ranking individual on your campus that seems appropriate for the visit. As a general rule of thumb, it is appropriate for the head of a visiting delegation to meet with a peer. A visiting president, for example, should, if possible, meet with the president of the hosting institution.
- Organize at least one formal group meeting during the visit. This might be a welcome meeting, a special reception or meal, or a concluding meeting to discuss the outcomes of the visit.
- Provide a campus tour, taking care to include student housing, academic buildings, or labs that may not be equally at the heart of your current collaboration, or a more thorough understanding of the campus by partner institution representatives may lead to expansion of the relationship.
- Keep the small touches in mind, such as posting a welcome sign, flying the flag from the visitor's home country, creating bilingual business cards, and arranging photo opportunities for the delegation.
- If time allows, consider including a visit to a local attraction or other ways to show something special about your institution or community. Meals and evening hours are great times for such activities.
- Be prepared to give a gift, and to receive a gift. While the gift exchange may not happen 100 percent of the time, it is best to be prepared. Often, the size of the gift is less important than the care and thoughtfulness with which the gift is provided.



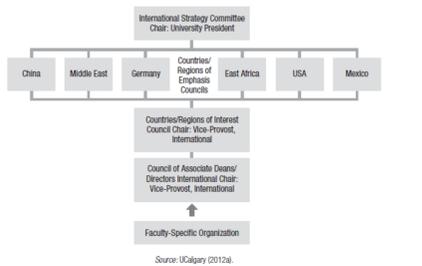
	HELP VET AND APPROVE PARTNERSHIPS	PROVIDE/ IDENTIFY FUNDING AND RESOURCES	ENSURE COMPLIANCE WITH INSTITUTION/ LEGAL POLICIES AND REGULATIONS	PROMOTE AND RAISE VISIBILITY OF PARTNERSHIP ACTIVITIES	IDENTIFY CONTACTS FOR NEW PARTNERSHIPS	ADVISE ON SPECIFIC ISSUES ON AN AD HOC BASIS
ACADEMIC AFFAIRS	✓	✓	✓	✓	✓	✓
ADMISSIONS			✓	✓	✓	✓
ALUMNI OFFICE		✓	✓	✓	✓	✓
COMMUNICATIONS		✓	✓	✓	✓	✓
DEVELOPMENT OFFICE		✓	✓	✓	✓	✓
EXPORT CONTROL	✓	✓	✓	✓	✓	✓
GRADUATE SCHOOL	✓	✓	✓	✓	✓	✓
LEGAL COUNSEL		✓	✓	✓	✓	✓
RESEARCH OFFICE		✓	✓	✓	✓	✓
RISK MANAGEMENT	✓	✓	✓	✓	✓	✓
SIO'S OWN OFFICE	✓	✓	✓	✓	✓	✓
TECHNOLOGY OFFICE		✓	✓	✓	✓	✓

Fig. 1-5: Obtained from ACE's *Internationalization in Action*, four-part series on international partnerships.

BENEFITS OF INTERNATIONAL PARTNERSHIPS



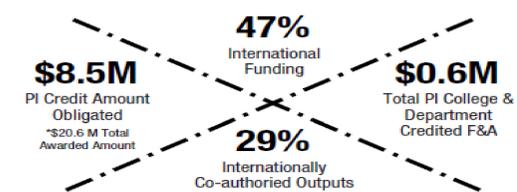
CASE STUDY 2: UNIVERSITY OF CALGARY



Additional Outcomes Over Five Years:

- 80% increase in international undergraduate enrollment
- CAD\$57 million increase in research funding
- CAD\$20 million raised for international development projects

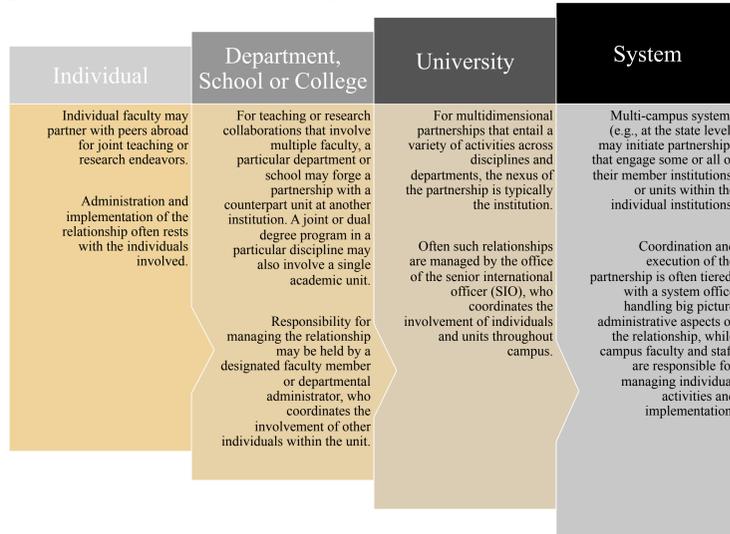
CASE STUDY 1: MICHIGAN STATE UNIVERSITY



Source: Payumo (2017).

Fig. 7-10: Di Maria, D. (2019) *Senior International Officers: Essential Roles and Responsibilities*. NAFSA: Association of International Educators: Washington, D.C.

LEVELS OF PARTNERSHIP ENGAGEMENT



INITIAL RECOMMENDATIONS

- Streamline processes, procedures and services for hosting international scholars and exchange students
- Develop strategy for succession planning so that partnerships do not end when faculty or staff champions retire
- Procure and implement an international partnerships tracking software
- Create an international partnerships officer position within IES
- Establish and publicize institutional policies and procedures related to international partnerships
- Form an international partnerships committee charged with vetting prospective university-level partnerships
- Support strategic engagement groups focused on specific countries, regions or topics
- Continue work to map UMBC's international connections
- Develop an institutional strategy for international partnerships that provides direction for future expansion and includes key performance indicators
- Improve communication regarding current partnerships, new agreements and related opportunities