

## **“Factors That Contribute to a Positive Linkage”**

### **Guideline document for OVPIA’s Offshore Programs and International Affiliations Committee during the review process**

#### **I. GENERAL FACTORS**

- A. While world rankings should not be the only criterion for partner selection, IU should nonetheless review multiple ranking sources in order to determine the stature of a potential partner. The expectation is that IU will engage in linkages with institutions of the highest caliber. However, what constitutes appropriate partnerships will vary with the size and mission of the IU campuses involved.
- B. Sustainability of the affiliation should be a major factor when selecting a partner institution. IU should evaluate the potential for partner institutions to contribute to the exchange as well as IU student interest in exchanges and faculty interest in joint research programs. Partnerships contingent on the action of a single faculty member are not as sustainable as those with shared support of multiple faculty members and are thus not recommended.
- C. Partnerships should be mutually beneficial. Many leading overseas universities might already have ongoing and substantial international partnerships. IU might, therefore, look beyond some of the more obvious top-tier universities to others that might complement IU or present excellent opportunities for collaboration.
- D. When relevant, IU should develop relationships with universities that have an established infrastructure for hosting overseas study students.
- E. Whenever possible, partnerships should involve collaboration of two or more schools across the university in order to leverage broader connections with the partner. This broadening of a partnership scope also increases the probability for the sustainment of the partnership.

#### **II. SPECIFIC FACTORS**

##### **a) Primary Agreements:**

- (1) There must be multiple opportunities at the partnering university for connections and exchanges with IU.
- (2) A historic linkage between IU and the partnering university may exist and may be part of the basis for a Primary Agreement.
- (3) A Primary Agreement can also be formed on the basis of institution building. *Institution building* is defined as an IU partnership with a relatively new or less developed university for the purpose of providing technical assistance, curriculum development, and human resources to foster growth in the partner university. An institution building agreement should be

service oriented but also be of benefit to IU by providing teaching and research opportunities abroad for IU faculty and by bringing international faculty and students to IU.

**b) Sub-Agreements:**

- (1) The agreement or plan must have the support of the Department/School or College Dean overseeing the agreement or plan.
- (2) The agreement or plan must align with the School's/College's strategic plan.
- (3) Immediate and viable exchange opportunities must be apparent.
- (4) Immediate and viable study abroad opportunities may be present with the agreement or plan.
- (5) Multiple faculty members should share an interest in and dedication to the agreement or plan.
- (6) Exchange visits between partners should have taken place.
- (7) The agreement or plan might act as a catalyst for future funding.

**c) Exceptions:**

- (1) There must be an apparent and defensible reason why IU should not pursue a primary agreement with the partnering university. An explicable reason may be because the partnering institution offers an opportunity for a mutually beneficial bond with a specific school or department but does not have the ability for system-wide collaboration (e.g. a music or law school with no other departments). Another reason to pursue this exception might be the partner institution's unwillingness to enter into a Primary Agreement with IU.
- (2) The partner institution may fulfill a specific research/area studies goal outlined by a specific department.
- (3) The renewal of a long-standing active affiliation is also reason for the consideration of a Standalone Unit-to-Unit Agreement.
- (4) In the event that solid world or national rankings are not available for the partnering institution, other criteria should be used to evaluate the institution's stature. Some of these criteria could be, but are not limited to, awards received by the department or university, publications of faculty in the department or university in peer reviewed journals, or the standing of the university's other partnerships.

**d) Offshore Activities:**

- (1) Proposals for full-fledged overseas IU campuses may originate only from the Office of the President.
- (2) The proposed program should advance the international mission of IU as outlined in the university's International Strategic Plan.

- (3) The stature of the partner institution(s) within the host country should be consistent with the stature of IU's participating campuses and schools.
- (4) The proposed program should fit a strategic priority of the university either in terms of the partner university or the country or region. The program should not result in unnecessary duplication of activities or linkages already in place in the host country.
- (5) Due diligence should, in most cases, be conducted regarding the partner's reputation, financial status and legal standing in the host country.
- (6) The program should adhere to the policies, standards and best practice guidelines of IU and appropriate accrediting bodies.
- (7) Proposals for facilitated transfer admission agreements or dual degree or joint degree undergraduate programs should include a provision that 50% or more of the required course work for completion of the degree programs should be taken at IU. International programs that entail offering more than five courses at an international site, a degree program with 50% or more of the requirements taught abroad, and/or the establishment of a new, overseas campus, may require formal approval by the NCA/HLC.
- (8) Proposals for facilitated transfer admission agreements must be limited to a specific term, involve review of course articulation arrangements by the appropriate academic units and campus admissions office and include a program review before renewal of the agreement. Institutions being considered for such agreements must be fully accredited by their Ministry of Education or other recognized accrediting body. In addition, an overseas institution sending students under such an agreement must agree to limit publicity of the facilitated transfer admission agreement and not imply any commitment for automatic admission to IU, or partnership (for exchange, dual degree programs or other collaboration) beyond the specific terms of the agreement.
- (9) The written agreement should provide IU the ability to regulate the use of the IU name and other IU trademarks in advertising and publicity abroad promoting the program.
- (10) The proposal must address the host country's regulatory requirements (e.g., accreditation, registration, employment laws, taxes, etc.) for establishing an academic program, which may require that the IU unit proposing the initiative pay for counsel in the host country to review the proposal and/or agreement.
- (11) The proposal should assess the competitive environment for higher education in the host country and the likelihood that there will be a sufficient number of qualified students to sustain a viable program.
- (12) The program must have a clearly articulated plan for withdrawal should quality-assurance and financial considerations fail to meet expectations. This should be provided for in contractual arrangements and in discussions with the counterpart organization during the planning process.