



Lebanese International University

POLICY & GUIDELINES

OFFICE OF THE INTERNATIONAL RELATIONS

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1. INTRODUCTION

Agreements with universities, government agencies and NGOs located in other countries are used to facilitate a range of international activities. Agreements provide important tangible benefits, such as revenues for services rendered, access to research facilities, Erasmus + projects, student and faculty exchange, etc. However, since countries have different legal systems and different standards and expectations in higher education, international agreements can sometimes introduce unanticipated liabilities and obligations. Agreements may also introduce distributed costs, duplication of effort or other inefficiencies that offset expected benefits. LIU must estimate the potential benefits and costs of these agreements. Wherever possible, LIU needs to monitor and manage these flows to maximize our return on investment in international initiatives. International agreements can be used to extend LIU's global reach and reputation. By planning and managing which agreements and institutional associations to pursue, LIU can affect its reputation in particular regions.

The purpose of this policy is to provide guidelines and step-by-step procedures for planning, initiating, evaluating and reviewing such agreements. Ideally, LIU would have agreements in place with any and all international institutions with which it intends to partner. This handbook provides a useful and practical working reference and a framework for faculty, staff, and academic units that consider collaborative research, teaching, faculty and student exchange, joint degree or non-degree programs, training and/or other professional development programs with an international counterpart abroad. It provides detailed information to assist all stakeholders at LIU as they begin the process of building international relationships and formalizing agreements. The OIR intends to review this handbook periodically and make updates as necessary.

2. TYPES OF INTERNATIONAL LINKAGES AND DEFINITIONS

2.1 Types

Agreements with international institutions may involve a variety of shared and exchange programs. The most common types of linkages include the following:

- 1) **General agreement:** General agreements are used to formally express institutional intent to pursue opportunities for collaboration. Typically, these agreements require no financial commitment for either institution. On the surface, they may seem to entail minimal risks. However, the agreement represents substantive, broad commitment, and should reflect institutional intent.
- 2) **Co-curricular program:** These are agreements covering a specific academic program or programs in which both institutions provide part of the requirements for the degree. The institutions must agree in advance which institution will grant the degree, courses that will be accepted in transfer, whether the second institution will grant a certificate of completion or other recognition of the joint nature of the studies, and many other details of the program. Such an agreement requires a great deal of work and the involvement of several offices at LIU to evaluate lists of courses that not only match LIU degree courses but also meet all LIU degree requirements
- 3) **Student exchange:** These are commonly referred to as "reciprocal exchange" agreements. Student exchange agreements allow students to pay tuition to the home institution and study tuition-free at the host institution. The students, in fact, trade places reciprocally, so it is important to exchange an equal number of students each year. An imbalance in the number of students exchanged may result in a financial loss to either the home or host institution.
- 4) **Faculty collaboration:** These agreements usually include faculty exchange in areas of teaching,

research or co-hosting seminars or conferences. Collaborations may be one-time or on-going, and may involve work done at one institution or both.

- 5) **Non-degree or non-academic program:** These programs are designed and delivered by LIU specifically for an academic institution and/or organization abroad. Such programs include courses and/or activities designed specifically to meet the requests of the international institution. Typically, the agreement facilitates payment for services rendered. Non-academic programs may be delivered on LIU campus or abroad. Schools or Units at LIU involved may issue certificates of completion to program participants. This type of program may also be offered by an academic institution and/or organization abroad or even locally.
- 6) **Credit transfer:** Many 2-year colleges and comprehensive universities abroad enter into articulation agreements on credit transfer. One institution usually enters into such agreements with other counterparts so as to give its students more options to choose. This type of agreement requires course review, evaluation and matching from department advisers and/or faculty and the Office of the Registrar.
- 7) **Consortium/membership:** These consist of formal or informal agreements or contracts between LIU and an educational association or consortium here or abroad to provide opportunities for individual students to study abroad. Examples include: International Student Exchange Programs (ISEP), Consortium of College International Studies (CCIS), etc. LIU both sends students abroad and receives foreign students through such consortia. These agreements usually are handled by the International Center unit of the Office of International Relations and could involve departments and college or schools for the curricula study of the student.

2.2 Definitions

- 1) **Letter of intent:** A Letter of Intent is designed to encourage mutual cooperation and friendship but involves no commitment other than to continue to work towards an agreement. Such a document is usually a first step toward a more detailed future Memorandum of Agreement. It may cover the general understanding of potential exchanges and a suggested timetable of further discussions; it can be used when long-term planning and negotiations have not yet taken place. A Letter of Intent attests to a successful meeting of representatives of two institutions and expresses a desire to promote cooperation. This kind of document can be used when the presidents of two institutions meet and wish to commemorate the occasion. A Letter of Intent is unnecessary unless it is desired by the international university.
- 2) **Memorandum of Understanding (MOU):** This is a binding agreement/contract between two parties. Components of such an agreement include a) institutional and/or organizational information; b) purpose(s) or goal(s) of the agreement, including identification of the academic units involved and the nature of the program; c) responsibilities of each institution; d) program management with designated individuals and offices of both parties including email addresses, phone/fax numbers, etc.; e) implementation date and duration; and f) other terms required by LIU.

This is a negotiated process, and should take into account the needs of the partner institution as well.

- 3) **Appendix or addendum:** An appendix or addendum supplements does not change the terms of an agreement or contract. This document usually provides details of a specific component referred to in the agreement or contract. It is a separate document, attached to a signed agreement, and becomes part of the Agreement. It provides added details to an on-going program. It may be part of an original agreement or added at a later time one or two components. In some cases, an agreement makes a commitment to different types of linkages, such as faculty exchange, joint programs, or student credit transfer for more than one discipline. The agreement may not include all the details of each type in the main body of the agreement but they appear in an appendix. In

other cases, the signed agreement only has one major focus such as a short-term summer program at the time when it is developed, but states an intent to expand to include other areas. An appendix or addendum is added when the expansion occurs. An appendix agreed upon at the time the original agreement is signed does not need to be signed. An appendix agreed upon at a later date must be signed by representatives of both parties.

- 4) **Amendment:** An amendment changes the terms of an agreement or contract. It may change the ending date, charges and fees, or substantive terms. In some cases, an agreement originally contemplates only one major focus, such as a student exchange, but the parties later decide to add another type of linkage, such as a faculty exchange. An amendment outlines the terms of the additional linkage. An amendment must be signed by both parties.)

3. EVALUATIVE CRITERIA

Often, LIU is approached by potential international partners to establish a formal agreement. Sometimes, LIU representatives see opportunities to build international connections; and request assistance in initiating a MoU. In considering any linkage agreement with institutions or organizations abroad, keep in mind the following questions, which will be used by all involved in reviewing submission.

- How does this partnership enhance the proposing unit's and/or LIU's academic excellence?
- How has (or does) this partnership contribute to new research or academic content?
- How might this partnership enhance the LIU student experience?
- What effect will this partnership have on LIU campus resources?
- Which faculty, chairs, deans, deans, donors, alumni or others now support this partnership?

Each proposed new agreement will be evaluated by these criteria. Members of the campus IMOU Review Committee will score the agreements based on the five questions listed above. These scores will be available to all stakeholders involved in agreements, including initiators. The criteria will also be used to review the performance of each agreement, up to three years after it comes into effect.

In short, the agreement must assure an appropriate return on investment if the agreement involves LIU financial and/or human resource commitment. It must also earn the support of all appropriate LIU leaders, and must undergo careful programmatic and legal review before it can be approved and signed.

4. INITIAL STEPS TO DEVELOPING AN AGREEMENT

An international linkage agreement must be consistent with the goals of the unit or units that will be involved in the agreement. Knowledge of the international priority of the proposing unit and the university is important before moving toward the development of an agreement.

- 1) **Choosing a partner:** In most cases, agreement initiators at LIU contact the individuals at potential partner institutions or organizations. It is important to consider factors such as site, type of academic institution, its academic strengths and weaknesses, assessment of its international interest and sources of financial support, etc. Sometimes, the partner institution strongly desires that a Letter of Intent be in place that defines what needs to be determined before a formal MoU is considered.
- 2) **Preliminary consultation:** The first place to consult is the Office of International Relations since it houses most of the LIU international linkages and agreements. It also provides advice and assistance to those exploring new international partners in terms of locations, types of programs, and the

university's global and international priorities. It is, of course, necessary and important that the person consults with his or her department and/or college to make sure what he or she proposes is truly supported by the department and college.

- 3) Identification of resources: All agreements need human and/or financial resources. For example: faculty may be needed to deliver programs either on-campus or abroad; staff may be needed to administer and support program delivery; and department and college budgets may require adjustment to provide necessary support. Agreements are essential to ensure LIU's international efforts lead to the success or strengthen the success of its core values of the university. It is important to estimate resource needs well in advance of finalizing the terms of an international linkage agreement.
- 4) International Agreement Planning Form: Any new agreement initiator needs to complete and submit the LIU International Agreement Planning Form. It requests key pieces of information that are needed for multiple purposes, such as for drafting the agreement after communication has been carried out both internally and externally. It also assures that the dean of target school and the university support the initiative.
- 5) **Next steps:** The Office of International Relations will meet with the initiators and other key LIU stakeholders/ participants to determine how to move forward. This will include the International MoU Committee review.

5. DRAFTING AN AGREEMENT

In some cases, prospective partner institutions or organizations may offer a draft agreement. As long as the written document accurately relates the terms agreed upon, most formats are acceptable. If LIU initiates the linkage, The OIR will provide a model for the agreement you seek, after reviewing the LIU International Agreement Planning Form and ensuring the proposed partnership is appropriate.

Samples of different types of standard agreements are provided in the appendices of this handbook. These are examples for a new arrangement.

Whenever there is a question concerning whether or not LIU should enter into a particular agreement, the provost, and Deans will recommend to the Executive Vice President to make the final decision. In the drafting process, a negotiation outline or strategy will be developed. Negotiation strategies include:

- Inquiring about the goals of the counterpart.
- Considering long-term as well as short-term goals and objectives
- Matching the proposed activities with the internationalization priorities of the university.
- Reviewing human and financial commitments of the directly benefiting department, college/school and other units.
- Considering whether there is a good match between the outcomes desired by LIU and the other university.
- Considering the time within which the commitments can be delivered.
- Aligning the goals of the agreement with LIU's mission, values and academic programs.

Sometimes, the persons directly involved in developing a linkage are in agreement on the academic aspects of the program. However, it is important not to make any firm commitments that the program will take place until the written agreement has been finalized. LIU has limits on what it can

promise, and international partners have similar limits and requirements for the language of the agreement. The language that is thought of as “boilerplate” (Boilerplate is any text, documentation, or procedures that can be reused more than once in a new context without any substantial changes to the original) is usually more than a mere formality, and an inability to agree on that may mean the program cannot go forward. For example, some countries may ask that LIU be subject to the laws of that country in ways that might subject individual faculty or students to suit by or liability to the partner institution in that country.

The persons initiating the linkage must also read the written agreement carefully to be sure that LIU can fulfill all of the commitments it makes. It is important that the written document accurately states what has been agreed upon.

6. COMPONENTS OF AN AGREEMENT

Each agreement will be specific to the goals and objectives of the partnership arrangement. However, all proposed international agreements or contracts must incorporate the following components:

- **Institutional and/or organizational information:** A brief description of both institutions including information about the history, major academic components, size of student body, strengths, ranking/accreditation, program specific information (if applicable), or other information as appropriate.
- **Goal(s) and objectives of the agreement:** A paragraph or more describing the overall purpose of the agreement.
- **Terms and conditions:** Details the precise items to which the partners are agreeing. This may include timelines, physical or research resources to be provided by each party, frequency and size of exchanges, qualifications of students who will participate, and other details so that it is clear to the reader what is required of each institution. This section also includes a brief description of the specific project or exchange and outlines the related activities.
- **Institution responsibilities:** This section describes the responsibilities each party will assume within the agreement period. Mutual responsibilities have to be spelled out in enough detail so that there is no ambiguity about which party is responsible for what. Responsibilities include, but are not limited to, the following items:
 - Costs such as tuition and fee rate, international and/or local transportation, housing, health insurance.
 - Programs such as content, grading criteria, length of delivery, credit or no-credit bearing.
 - Transfer of credit and English language testing.
 - **Contact information:** Include a list of names and/or offices from both parties for the on-going management of the agreement after both sides sign it. The contacts from both parties will be responsible for communications and for administering the agreement.
 - **Abiding by institutional policies:** A section should state that neither partner institution may take any action contrary to established policies, procedures, and practices of the other institution.
 - **Agreement modification:** This section should describe the process by which the agreement can be modified, amended, or supplemented, including who is authorized to modify, amend, or supplement the agreement.
 - **Duration:** Describe how long the agreement will be in effect. Agreements must have an expiration date. Most agreements should have a life of three to five years. LIU cannot permit agreements that are in effect for more than five years, or those that are automatically renewed. However, LIU will evaluate the success of the objectives of the agreement at least

annually.

- **Extension or renewal:** Describe the procedure for extending or renewing the agreement, including the minimum length of time for giving notice by either partner. The method of extending or renewing the agreement can vary to accommodate the partner institution's needs.
- **Termination:** Detail the procedure for terminating the agreement before the expiration date, including the minimum length of notice by either partner that it wants to terminate the agreement. Generally, a period no less than two months or no more than six months should be specified.
- **Signatures:** All agreements will have a signature section at the end of the document. The agreement is signed by both partner institutions. At LIU, all international linkage agreements must be signed by either the President or provost after the appropriate agreement reviews are complete.

7. AGREEMENT REVIEW AND APPROVAL

1) Unit responsibilities.

- a) **Office of International Relations:** In general, the OIR functions as the coordinating and facilitating body throughout the process of international linkage development and implementation. Functions include:
 - Arrangement of agreement clearances;
 - Assisting with contacts here and abroad;
 - Conducting periodic update meetings with responsible individuals at LIU for each agreement. (These meetings will include progress reports, which summarize activities and provide recommendations on whether the agreements need to be revised, renewed, or suspended, etc).
 - Identifying both positive and potentially negative impacts of any linkages on broad institutional policies, such as employee benefits, tuition rate, academic credit, availability of university housing, salary equivalents.
 - Assuring that all units of the university that will be impacted by the agreement know about and have been consulted about the agreement before it is finalized. Such an administrative role of the center helps create a long-term record, prevent unsustainable linkages, and build up a pool of international expertise that is easily accessible to the campus community.
- b) **International Memorandum of Understanding Review Committee:** The IMOU Review Committee is comprised of LIU faculty members and staff who represent the range of stakeholders and/or provide knowledge and experience in international agreements from legal, regulatory or programmatic perspectives. This committee is appointed by Deans, provost, and is chaired by the Director for international programs.
- c) **Department chair or academic program director:** Department chairpersons or academic program directors or deans evaluate any proposed agreement that involves that department or program. Agreements must meet the unit's academic priorities while balancing its resources and commitments. The chairperson or program director must communicate with the college dean and make sure to have the school's endorsement for the program.
- d) **School dean's office:** The school dean evaluates any proposed agreement that relates to the college programs and resources. The dean must also verify that the proposed activities, financial implications and obligations, and payment processes, in the agreement are consistent with university policies.
- e) **LIU OIR and University General Counsel:** Any formal and new agreement or contract

between LIU and institutions/organizations abroad must be shared with the university General Counsel. According to university policies, the agreement is not legally binding until signed by all parties.

- f) **Director of the Office of International Affairs:** The Office of International Affairs reviews all international linkage agreements to ensure that they comply with internal university policies and priorities.
- g) **Offices of the Executive President/ VP and Provost:** The President's signature is required when an international counterpart will have or already has its university president's signature on the agreement. In most other cases, the provost may sign the agreement for LIU. Two copies of the agreement with a completed the Agreement Review Routing Form attached will be distributed to the Director of OIR for review and approval prior to acquisition of the provost or chancellor's signature.

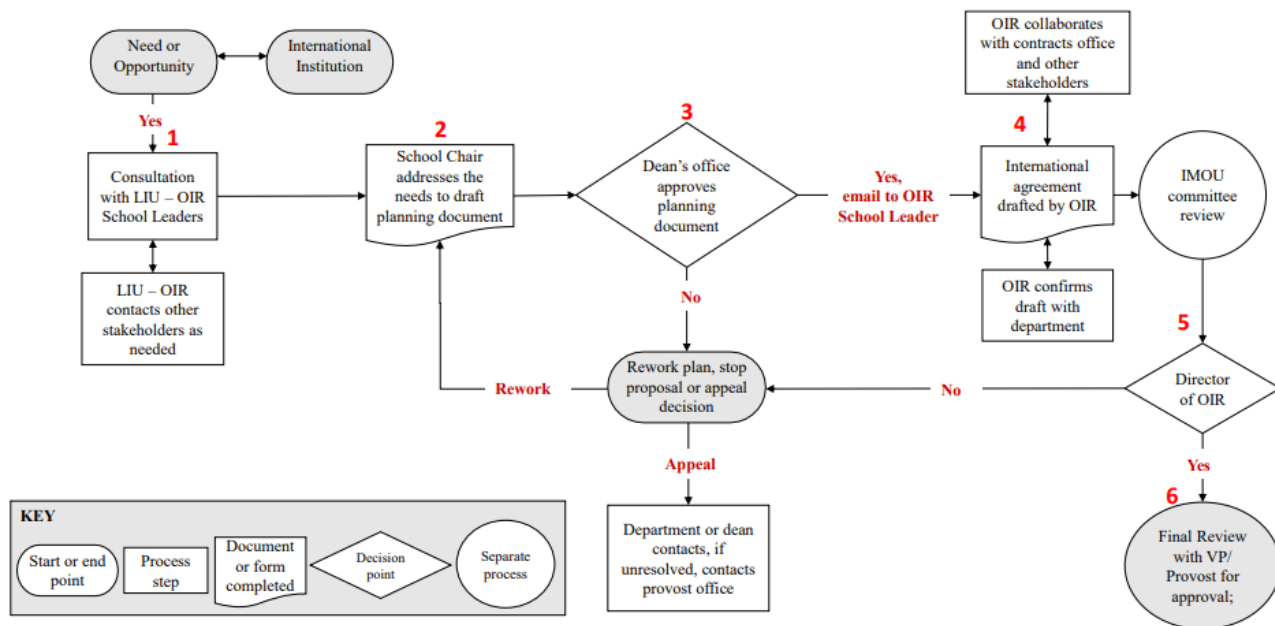
2) Process

Figure 1 page 10 summarizes the following process for establishing a formal international agreement at LIU:

- a) **Identify need or opportunity:** The international agreement process begins when an LIU faculty member, staff member or administrator identifies a need or opportunity that an international linkage could address. In some cases, this may be prompted by an overture or proposal from an international institution. Before consulting the OIR to start a review and approval process, the initiator should discuss feasibility and support with others in the unit and potential international partners, referencing the evaluative criteria in the handbook on page 9 of this document.
- b) **Consult with OIR:** Before drafting documents or moving forward with the potential international partner, the initiator should consult with the Director of OIR. This will ensure early consideration of feasibility and alignment with strategic priorities, as well as the notification and involvement of necessary stakeholders, especially where there are distributed costs.
- c) **Complete and obtain approval of the planning form:** After consultation with the OIR, the initiator must complete International Agreement Planning Form. This form requires information about the both parties to the agreement, both at LIU and the foreign partner institution, as well as information about the proposed collaboration, including goals and objectives; current and planned activities; required commitments of funding, space, time or other resources; and potential products. The dean or appropriate unit official must approve the International Agreement Planning Form before it is submitted for review.
- d) **OIR drafts agreement:** Based on the approved planning form, International Center staff will draft the international agreement in consultation with the initiator and the OIR office. In some cases, prospective partner institutions or organizations may offer a draft agreement. If so, the OIR School Leader will review to confirm that the document accurately and completely reflects the collaboration described in the planning form and complies with LIU requirements. The OIR may suggest changes.
- e) **IMOU Committee review and recommendation:** Using the evaluative criteria listed in section 3 on page 9, the IMOU Committee will make a recommendation as to whether the agreement should be approved to the Director of OIR
- f) **Approval by Director of OIR:** If the Director of OIR approves the proposal, it is forwarded to the provost and Executive VP, as appropriate, for final review and approval. If the Director of IR does not approve the proposal, the initiator may choose to abandon or rework the proposal, or ask their dean/director to initiate an appeal of the decision.
- g) **Final approval:** Final approval of the agreement will be provided by the Executive VP and provost. Fully signed copies of the agreement will be kept at OIR office.

Source varies: Faculty, staff, administrator, LIU or other institutions,...

Figure 1. International Agreement LIU Process Map



8. EVALUATION AND RENEWAL

- 1. Evaluation:** Whether or not this is addressed in the agreement, LIU must evaluate each agreement's effectiveness periodically. Halfway through the life of an agreement (typically 2 ½ years into a 5-year agreement), the IMOU Review Committee consults with the agreement's designated LIU contact person, and any pertinent OIR School Leader to assess the performance of the agreement on the same evaluative criteria described above. Results of this assessment will be reported to the Director of the OIR, and to all relevant stakeholders. If the decision is reached to terminate an agreement, that decision must be communicated to our international counterpart in a timely manner. The Director of OIR will facilitate the evaluation process in consultation with the appropriate departments, or schools.
- 2. Renewal:** Six months prior to the end date of an agreement, a final evaluation should take place. At that time, a decision will be made to renew without change or to renew with changes to any of the existing agreement terms. If the continuation of the relationship also means adding or expanding to include additional academic programs, affected department(s), schools and office(s) should be involved in the discussion and decision-making following the processes outlined for developing a new agreement. In cases where the terms of the agreement do not change, the extension or renewal may be done through an exchange of email, letters or memoranda. Where the terms change, an amendment may be required. In all cases involving modifications to the original agreement, an extension or renewal requires the signatures of both partners. The OIR will facilitate the process of renewing or revising the agreement.

9. INTERNATIONALIZATION STRATEGY

1. Strategic Context

The global context in which LIU operates requires connectivity beyond the boundaries of our immediate environs and country. While we seek to expand our international presence and interactions, this Internationalization Plan builds on our already strong international connections. It was developed as an outcome of LIU's 2021-2025 Strategic Plan and is guided by specific goals to foster a diverse educational environment and increase international exposure and experiences for students, staff, and faculty by expanding opportunities abroad, synergy of education, research and innovation as well as bringing international students, academic professionals, and scholars to our Lebanon campuses

2. Strategic Goals

In line with LIU's mission, this Internationalization Plan aims to help guide all efforts and activities at the different academic, research and administrative units towards fostering an international academic environment and to increase mobility of students and academic staff and to promote cooperation with other universities in Lebanon and abroad, in order to exchange experience and share education, research and development capacities. LIU strongly believes that students should be exposed to alternative cultures and experiences that provide a vibrant, challenging and stimulating learning environment that prepares them to live, work and succeed in an interconnected world.

The themes and activities were determined based on their importance to LIU and their ability to help accelerate the internationalization effort. More importantly, they are designed to be synergistic and mutually supportive to provide strategic leadership for achieving desired outcomes that will have a transformative impact for improving the quality of all university activities and inform decisions. The themes are as follows:

3. Internationalization Plan Themes

The strategic goals of the Internationalization plan are presented in four thematic pillars:

- I. International Mobility Opportunities
- II. Internationalization of Students
- III. Internationalization of the Curriculum
- IV. Strategic Partnerships and External Networking