From Conception to Implementation:

A Journey Through International Partnership Assessments

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- Andrea Delgado Morrow, University of Calgary
- Garrett Margliotti, University of Pittsburgh
- Laura Daversa, University of Pittsburgh
Goals for Today’s Presentation

• Importance of Global Partnerships & Engagement
• Gauging Audience’s Global Partnership Assessment* Efforts
• Conception to Implementation: Status Updates and Strategy of UCalgary and Pitt
• Roadblocks and Challenges
• Steps and Tools for the Future

*Disclaimer: Assessment and Inventory will be used interchangeably in this session
Why Assess?

- Partnerships are at the core of global strategies
- With methods and systems of business intelligence, institutions aim to make sound decisions:
  - Consolidation of existing partnerships
  - Sunsetting of some agreements
  - Development of new initiatives
  - Identification of "strategic" partnerships
- Determine outcomes expected in terms of international learning experiences, education, research, training and social contribution
- Create alignment with faculties and units and engage the community in internationalization efforts
- Illustrate the return on investment (ROI)
- Communicate the impact of internationalization to diverse stakeholders
Who’s in the Room?

Who here already has an assessment/inventory tool in place?

What are you struggling with when it comes to international partnership assessment/inventory?

Go to: https://www.menti.com/fvop64m7h3
Passcode: 9230 4728
Poll Responses
**Background**

**Mutual Goal:** Assessment/Inventory of partnerships for all international academic partners.

**University of Calgary’s International Partnership Assessment Rating Index (IPARI)**

**Why?**
- Tracking/monitoring partnerships
- Integrating data surrounding partnerships into decision making

**How?** Uses a set of criteria and scoring system within three (3) designated categories to track partnership activities.

**University of Pittsburgh’s Global Partnership Inventory Tracking Tool (GPITT)**

**Why?**
- Pitt Global Plan & institutional commitment
- Deepen relationships and identify opportunities for resource sharing (virtual programs and in-country assistance)
- Connecting faculty around regions & concepts to streamline and support efforts

**How?** Using a set of criteria and scoring system within four (4) designated categories to track partnership activity.
University of Calgary's International Partnership Assessment Rating Index (IPARI)

2016
Need for quantitative assessment tool identified

2017
Launched pilot IPARI

2018-2020
Minor modifications
Present
IPARI assessment completed for 2013-2021

IPARI (30 points)
Academic Programs & Collaborations (7 points)
Mobility Programs (12 points)
Research Collaboration & Impact (11 points)

AIEA: Leaders in International Higher Education
## IPARI's Research Collaboration and Impact

### Specific Research Agreement
- Yes = 1

### Research/commercialization Activity
- Identify specific activity, collaboration, joint supervision, participation in thesis examination, etc.
- Maximum = 1

### Joint Publications – based on SCOPUS - Total
- 1 to 25 = 1
- 26 to 50 = 2
- 50+ = 3

### Distribution Publications in Disciplines (SCOPUS – range of faculties)
- 1 to 3 faculties = 1
- 4-6 faculties = 2
- 7+ faculties = 3

### Joint Research Funding ($)
- Up to 50K = 1
- 50-200K = 2
- Over 200K = 3

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**Connections to Strategic Themes**

**Special Agreements**

**Publications**

**Other Activities**

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**AIEA: Leaders in International Higher Education**
IPARI's Research Collaboration and Impact

**WORLDWIDE (2018-2019)**

- **ACADEMIC PROGRAMS & COLLABORATIONS (APC) ONLY (1.1%)**
- **MOBILITY ONLY (17.5%)**
- **ALL (3.3%)**

<table>
<thead>
<tr>
<th>External Institutions</th>
<th>Specific Research Agreement**</th>
<th>Research Funding***</th>
<th>Joint Publications (2019/2020 - Scopus)**</th>
<th># of Publications</th>
<th>Distribution of Disciplines (Scopus)****</th>
<th># of Faculties</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>University X</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>4</td>
<td>1</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>University Y</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>5</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>University Z</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>12</td>
<td>1</td>
<td>3</td>
<td>2</td>
</tr>
</tbody>
</table>
**IPARI's Academic Programming and Collaboration**

<table>
<thead>
<tr>
<th>Articulation Agreements</th>
<th>Annual # of students - Active Articulation Agreements (2+2 / 3+2, dual degrees, 1+1 )</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1 to 5 = 1</td>
</tr>
<tr>
<td></td>
<td>6 to 10 = 2</td>
</tr>
<tr>
<td></td>
<td>10+ = 3</td>
</tr>
</tbody>
</table>

| Cotutelle (student participation) | Maximum = 2 (up to 3 students=1, otherwise 2) |

| Training/ Professional Programs | Maximum = 1 |

| Engaged for Special Projects (ex: A Program at Host University for International Development, UCalgary Office, Network partner) | Yes = 1 |
University of Pittsburgh’s
Global Partnership Inventory Tracking Tool (GPITT)

Enhancement and Uniqueness of GPITT
• Visitors and Joint Conferences
• J1 Student, Interns and Scholars
• Remote Collaboration and Global Operation Support

GPITT (99.5 points)
• General (8 points)
• Academic (32 points)
• Research (17 points)
• Mobility and Engagement (42.5 points)
## GPITT: Mobility and Engagement

### Joint Conferences and Visitor Data

<table>
<thead>
<tr>
<th>Has Pitt hosted joint collaborative events and conferences?</th>
<th>During this inventory period, have there been any visitors at Pitt for 14 days or more?</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOINT HOSTED conference(s) = <strong>2 points each</strong></td>
<td><img src="chart.png" alt="Chart showing points" /></td>
</tr>
<tr>
<td>Partner’s LEADERSHIP attends event or a partner acts as a PANELIST or SPEAKER for a Pitt event = <strong>1 point each</strong></td>
<td></td>
</tr>
<tr>
<td>Participation/attendance only = <strong>0 points</strong></td>
<td></td>
</tr>
<tr>
<td>Maximum of <strong>4 points</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Additional 1 point per type**
- Non-Teaching Exchange
- Teaching Commitment
- Staff Exchange
- Formal Delegation
- Senior Leaders from Partner Institution
**Question:** During this inventory period, has Pitt hosted any J-1 Interns, J-1 Short-Term Scholars or J-1 Research Scholars?

<table>
<thead>
<tr>
<th>Source of Financial Support</th>
<th># present in U.S. for 2 years or less</th>
<th>Weighted Points</th>
<th># present in the U.S. for more than 2 years</th>
<th>Weighted Points</th>
<th>Sum</th>
</tr>
</thead>
<tbody>
<tr>
<td>J-1 Interns</td>
<td>--</td>
<td>0.4</td>
<td>--</td>
<td>--</td>
<td>0</td>
</tr>
<tr>
<td>J-1 Short-Term Scholars</td>
<td>Pitt</td>
<td>0.3</td>
<td>--</td>
<td>--</td>
<td>0</td>
</tr>
<tr>
<td>Home Institution</td>
<td></td>
<td>0.5</td>
<td>--</td>
<td>--</td>
<td>0</td>
</tr>
<tr>
<td>J-1 Research Scholars</td>
<td>Pitt</td>
<td>0.2</td>
<td>0.1</td>
<td>0.1</td>
<td>0</td>
</tr>
<tr>
<td>Home Institution</td>
<td></td>
<td>0.3</td>
<td>0.2</td>
<td>0.2</td>
<td>0</td>
</tr>
</tbody>
</table>

**TOTAL POINTS (Max: 3 points)** 0

**New Addition Coming:** Government Sponsorship under Source of Financial Support
<table>
<thead>
<tr>
<th>Question</th>
<th>Global Operations</th>
<th>Point Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Has Pitt:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hired or paid for affiliates/representatives/providers from this partner?</td>
<td></td>
<td>Yes = 2 points each</td>
</tr>
<tr>
<td><strong>Has the partner assisted with:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local compliance regulations and insurance?</td>
<td></td>
<td>Yes = 1 point each</td>
</tr>
<tr>
<td>Managing relationships with local governments and/or NGOs?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local logistics (hotel bookings, car service, etc.)?</td>
<td></td>
<td>Yes = 1 point each</td>
</tr>
<tr>
<td>Providing unique resources unavailable on the University of Pittsburgh campus?</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Remote Engagement &amp; Mobility Collaborations</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has the partner provided:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>On-campus space (including labs, classroom space, etc.)?</td>
<td></td>
<td>Yes = 1 point each</td>
</tr>
<tr>
<td>Remote engagement with local communities, governments, NGOs, etc.?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have virtual internships been participated in through this institution?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Conceptualization

**Lead**: International Offices

**Key Concepts**: Meetings with other institutions who have developed a similar tool, buy-in and support from key champions, reviewing old documentation from previous focus groups on larger plans, etc.

**Unique Concepts to Consider:**

<table>
<thead>
<tr>
<th>University of Pittsburgh</th>
<th>University of Calgary</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Built upon objectives in Pitt Global Plan</td>
<td>• Based on International Strategy/Global Engagement Plan</td>
</tr>
<tr>
<td>• Direct feedback in Global Plan development on closer and easily recalled relationships</td>
<td>• Identified as a need by faculties and ELT representatives</td>
</tr>
<tr>
<td>• Considerable benchmarking within Pitt (OIEP developed something similar for Industry relationships) and outside of Pitt</td>
<td>• Research and analysis of other assessments</td>
</tr>
<tr>
<td></td>
<td>• Led by International Office as a way to track and monitor partnerships and make strategic decisions</td>
</tr>
</tbody>
</table>

**Final Take Away**: Not reinventing wheel, speaking to others, garnering key champions for next phase
### Aligning Assessment with Goals

#### Goals

**GOAL 2: Priorities and Areas of Responsibility:**

<table>
<thead>
<tr>
<th>Area of Responsibility</th>
<th>UCI</th>
<th>Registrar’s Office</th>
<th>FGS</th>
<th>Faculties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intercultural Capacity Building</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>International Learning Experiences (ILE) and Intercultural Capacity-building Experiences (ICE)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Eliminating Barriers to ILE</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Academic &amp; Mobility Agreements</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Fees, Funding &amp; Scholarships</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

**GOAL 3: Priorities and Areas of Responsibility:**

<table>
<thead>
<tr>
<th>Area of Responsibility</th>
<th>UCI</th>
<th>VPR</th>
<th>Faculties</th>
<th>Continuing Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research &amp; Innovation Partnerships</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Global Development Partnerships</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Diplomatic &amp; Consular Corps Partnerships</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Training &amp; Professional Development Partnerships</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

### Foundation

- Country strategy
- Research and academic priorities

### Accountability

- Responsibility matrix
Aligning Inventory with Goals

• Plan for Pitt
• Global Plan 2.0
• Incubator and Operational Strategy
• Underpinned by GPITT and tools
• Year of… Data and Society

• Next:
  • Making a more deliberate connection to new Plan for Pitt through a matrix approach.
Consultation

**Lead:** International Offices

**Key Concepts:** Data Stewards, 2-way data sharing, garnering buy-in from key contributors for project, understanding areas of concerns or needs from key contributors. Understanding unit terminology and identifying inconsistencies in data collection (Example: University Names)

**Unique Concepts to Consider:**

<table>
<thead>
<tr>
<th>University of Pittsburgh</th>
<th>University of Calgary</th>
</tr>
</thead>
<tbody>
<tr>
<td>• ½ day retreat with key data stewards</td>
<td>• VPI created sub-committees to define criteria</td>
</tr>
<tr>
<td>• Presentation to Schools of Health Sciences</td>
<td>• Data requirements outlined</td>
</tr>
</tbody>
</table>
| • Defining terminology and consistent data points. | • Definitions clear  
  and consistent (reporting periods, terminology) |
| **Example:** University Library System Data | • Consultation with faculties, data sources & owners  
  **Example:** Work with IT & Office of Institutional Analysis  
  (Creation of Data dashboard) |

**Final Take Away:** Identifying units and partners on campus that will be your champion through this process is key. This may include IT, study abroad offices, etc.
Engaging Stakeholders & Garnering Buy-in

Group Discussion: What things should you consider when garnering buy-in for large projects at your University?

Go to: https://www.menti.com/qhzxs4d6cn
Passcode: 2915 0547
Data Visualization of Question
Socialization

Lead: International Offices
Key Concepts: Education, focus groups, presentations, buy-in, etc.

Unique Concepts to Consider:

<table>
<thead>
<tr>
<th>University of Pittsburgh</th>
<th>University of Calgary</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Presentation to Provost Cabinet and key faculty champions</td>
<td>• Consultation with all international units</td>
</tr>
<tr>
<td>• Schools of the Health Sciences Global Committee</td>
<td>• Discussions &amp; presentations with Associate Deans International Council</td>
</tr>
<tr>
<td>• Unique structure – lower/upper campus</td>
<td>• President, Provost &amp; Vice-President Research</td>
</tr>
</tbody>
</table>

Final Take Away: Garnering key champions for next phase, understanding school/department cycle, etc.
Benefits of IPARI and GPITT

- Comprehensive understanding of global partnerships and international programming
- Breakdown of silos to better connecting schools, departments, and offices with mutual interests
- Strategic data for decision making
- Standardization of data points
- Objective lens for deepening and sunsetting partnerships
- Monitoring partnerships to mitigate risks and identify trends
- Integrating data into internal processes
- Maximization of resources

AIEA: Leaders in International Higher Education
Implementation

**Lead:** International Offices

**Key Concepts:** Secure means of data sharing, identifying cycles of data, detailed Standard Operating Procedures, easy and concise forms for collecting, training for contributors

**Unique Concepts to Consider:**

<table>
<thead>
<tr>
<th>University of Pittsburgh</th>
<th>University of Calgary</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Clear definition of responsibilities</td>
<td>• International Office led process</td>
</tr>
<tr>
<td>• Unique Excel documents for data collection</td>
<td>• Faculty commitment to provide annual data</td>
</tr>
<tr>
<td>• Meetings with Schools during 1st round to understand exact data needs</td>
<td>• Creation of data model based on measurement</td>
</tr>
<tr>
<td>• Unique questions for post collection distribution and projects</td>
<td>• Hiring of a computer science Co-op student</td>
</tr>
<tr>
<td></td>
<td>• Integration of business intelligence tools such as Power BI in hopes of automation</td>
</tr>
</tbody>
</table>

**Final Take Away:** Clear implementation plans, means of collecting data, and additional time in calendar for questions, issues, concerns, hard vs soft deadlines
Reporting

Lead: International Offices

**Key Concepts:** Developing unique report structures per constituents. Understanding how data will be used in larger university decision-making.

**Unique Concepts to Consider:**

<table>
<thead>
<tr>
<th>University of Pittsburgh</th>
<th>University of Calgary</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Unique reports by constituents</td>
<td>• Integrated into KPIs and reported up to General Faculties Council and Board of Governors</td>
</tr>
<tr>
<td>• Will be entered into MoveOn System</td>
<td>• Integrated into daily business processes to help make decisions</td>
</tr>
<tr>
<td>• Integration into strategic decision making for Vice Provost of Global Affairs and University Leadership</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Presentations with faculty to discuss results</td>
</tr>
</tbody>
</table>

**Final Take Away:** Understanding what data is important to whom and how to assist faculty, schools, and their senior leaders with their global ambitions.
Reporting Using IPARI Data

GOAL #3: ENHANCE INTERNATIONAL PARTNERSHIPS FOR RESEARCH AND EDUCATION

WORLDWIDE (2018-2019)

- 234 active university partners in 55 countries at the end of 2018-19
- 170 Mobility Partners
- 384 Research Partners
- 38 Academic Programs and Collaboration Partners

New agreement

An agreement with University of Calgary International can result in several mutually beneficial outcomes.

Do you want to see a new agreement? Please fill out and submit the application below.

Renew agreement

Do you want to renew your agreement with us?

Do you want to renew your agreement with us? Fill out and submit the application below to initiate renewal.

CHINA BRIEF REPORT

UNIVERSITY OF CALGARY INTERNATIONAL – July 2023

China recognizes the People's Republic of China as the legitimate government of China, if includes Hong Kong, Macao, and Taiwan.

Agreements

- Universities, 50 active and 34 in preparation agreements exist between Calgary and 18 institutions in China in programs such as MSc, BSc, Articulation, and Training programs.
- 284 of our partners are Double First-rate Universities, including six universities from the C9 League and four from the Z1 League.
- C9: Peking University, Tsinghua University, Shanghai Jiaotong University, University of Science and Technology Beijing, Nanjing University, and Harbin Institute of Technology.
- Z1: Beijing Institute of Technology, Tsinghua University, Tsinghua University, and Harbin Institute of Technology.

International Partnerships Assessment Rating Index (IPARI)

- IPARI Analysis: 42 active university partners, 30 active partners in Academic and Research, 2 active partners in Mobility and Research, 2 active partner in Academic and Mobility, 18 active partners in Mobility only, 18 active partners in Academic only.
- Top 5 partners: Peking University, Beijing Normal University, Tsinghua University, China University of Hong Kong, Shanghai University, and Normal University.

Educational Institution: Normandia

Exchange

Other

Long-term

Double

Joint

Institution

X

- Faculty of Science (2-3)
- Faculty of Nursing (2-3)
- normsandia (2-3)

Since

X

2005

X

21

1) China Brief Report (19 May 2023)
2) Subject to China's appropriate policies and regulations in international education and promotion. Collaborative agreements are subject to exchange agreements and academic partnerships.

AIEA: Leaders in International Higher Education
Reporting Using GPITT Data

Reports Include:
• Intro on GPITT and PittGlobal efforts
• Philosophy Statement
• Understanding the Data
• Confidentiality Notice
• Categorical and Total Scores with Assigned Tier of Engagement
• List of Schools with Investment
• Relevant Regional Centers/Departments
• Summary of Current Agreements & Project Administrators

Customized reports for:
• General Reports
• AVC of Schools for Health Sciences
• Vice Provost for Global Affairs and university senior leaders

Vice Provost for Global Affairs Report provides:
• Additional qualitative and strategic analysis, potential connections, relevant Impact Areas, notes on potential senior leadership travel, etc.
Lesson Learned & Goals

Consultation & buy-in from leadership & faculty

Clarity surrounding definitions/scope

Complexity surrounding Data management

Manual & time consuming

Reciprocity

Evaluation included agreements with educational institutions only

Standardized scoring process for all agreement types

Partnerships with same rating

Terminology Assessment Vs. Inventory

Institutional Commitment is Key

Better Education and Buy-In on ROI
University of Calgary Future Plans

- Alignment with new GEP
- More consultations with faculty – launching working group
- Integrating more Qualitative Data
- Getting partner's feedback
- Utilizing Technology to automate process
University of Pittsburgh Future Plans

What Guides Us

- Alignment to the new Pitt Global Plan 2.0 and Plan for Pitt
- Unique build out and data collection into MoveOn
- Inverse to GPITT – understanding opportunities with Partners for engagement
- Exploring more robust data collection IT solution
- Sharing final data reports with Partner
Thank You!

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