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| **PROPOSAL** |  |  |  | **COMMENTS** |
| **Name of partner** |  |  |  |
| **Type of Partnership or Collaboration** | *Delete from the following as applicable:** *Friendship Agreement*
* *Progression Agreement*
* *Articulation*
* *Validation*
* *Franchise*
* *Dual or multiple award*
* *Double award*
* *Research degree with co-supervision*
* *Joint programme*
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| **STRATEGY AND RATIONALE** |  |  |  | **COMMENTS** |
| **Rationale for the Partnership** | *Provide a brief rationale for developing the partnership and the context within which it will operate.* |  |  |
| **Strategic objectives of other party**  | *Provide details of the Partner’s strategic plan or equivalent (for example, key points from the University mission statement)* |  |  |
|  **Contribution to University Strategy**Partnerships must align with the core mission of our University, being excellence in research and excellence in education. Set out below are the six operating principles from the University’s [strategic framework for partnerships](https://www.essex.ac.uk/partners/documents/restricted/partnerships-framework.pdf). Please indicate how the partnership satisfies each of the principles. It is not necessary for a partnership to satisfy all of the principles but the identified strength(s) of the partnership should be the dominating characteristics: |
| * Institutional reputation
* Visibility and impact
* Growth and sustainability
 | * Enhancement
* Diversification and innovation
* Student experience and outcomes
 |
|  |  |  |  | **COMMENTS** |
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| **DETAILED INFORMATION ABOUT THE PARTNER AND ITS STANDING** | *0* |  |  | **COMMENTS** |
| **Company number** (if applicable)[[1]](#footnote-1)  | *Number* |  |  |
| **Size of institution or student population**  |  |  |  |
| **Does the other party have a ‘Tier 4’ licence?**[[2]](#footnote-2)  | *Y/N (not applicable to overseas providers)**Rating and date checked* |  |  |
| **Is the other party included as a ‘listed body’ on the BIS website?**[[3]](#footnote-3) | *Y/N (not applicable to overseas providers)**Rating and date checked* |  |  |
| **Is the other party aware of the Prevent Duty Guidance[[4]](#footnote-4) for further education institutions in England and Wales in respect of the Counter-Terrorism and Security Act 2015?**  | *Y/N* |  |  |

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| **PARTNER’S REPUTATION** |  |  |  |  | **COMMENTS** |
| **The other party’s reputation has been checked through checks with other academic institutions** | *Yes/No**Details (e.g. of partnerships with other UK HE institutions)* |  |  |
| **The other party’s reputation has been checked through consultation with the British Council and/or other suitably placed neutral bodies**  | *Yes/No* *Details* |  |  |
| **Quality control and assurance** | *Indicate whether there are clearly laid down and understood policies and procedures for the monitoring of courses in the partner institution and their relationship to those of our university* |  |  |
| **Research Ethics** | *Provide details of research ethics policy and practice in the partner institution to ensure appropriate procedures are followed for research undertaken at all levels by staff or students complies with the legal requirements of the UK, and/or the country of location of the research project.* |  |  |
| **Student support and welfare** | *Describe the partner institution’s arrangement for student welfare, pastoral support and, if appropriate, recreational facilities.* |  |  |
| **Administration** | *Describe briefly the policies and procedures for student enrolment and registration, record-keeping and liaison with our university.* |  |  |
| **Staff development**  | *Describe the partner institution’s policy and arrangements for staff development.* |  |  |

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| **GOVERNANCE AND LEGAL MATTERS** |  |  |  | **COMMENTS** |
| **Copies of other party’s constitutional documents appended (e.g. charter or articles of association)**[[5]](#footnote-5) | *Yes/No**Details (i.e. are there any issues)* |  |  |
| **Management structure appended (incl. structure of relevant department(s))** | *Yes/No**Details (i.e. are there any issues)* |  |  |
| **Is any overseas, in-country governmental approval or registration of individual courses required?** | *Yes/No**Details* |  |  |
| **Parent companies or subsidiaries** | *Details (e.g. X is a subsidiary of Y but has authority to enter into own agreements)* |  |  |
| **Contractual autonomy** | *Indicate whether the partner institution has the capacity to enter into a contractual relationship with our university and deliver higher education provision or whether this will need to be established via another party, e.g. parent or subsidiary company* |  |  |
| **Health and Safety** | *Indicate whether the partner institution is compliant with relevant legislation and guidance on health and safety. Provide a copy the partner’s Health and Safety Policy, if applicable.*  |  |  |

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| **GOVERNANCE AND LEGAL MATTERS** |  |  |  | **COMMENTS** |
| **Insurance** | *Does the other party fulfil its obligations in respect of all insurances required by local law, e.g. buildings and contents, public liability, employer’s liability?**Provide copies of current and valid insurance certificates for each of the above and the period the insurance covers. Receipt of the necessary evidence is required and should be checked annually.* |  |  |
| **Data Protection** | *Indicate whether the partner institution is compliant with relevant legislation and guidance on data protection. Provide a copy the partner’s Data Protection Policy, if applicable.* |  |  |
| **Equality** | *Indicate whether the partner institution is compliant with relevant legislation and guidance on equality. Provide a copy of the partner’s Equality and Diversity Policy, if applicable.*  |  |  |

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| **FINANCIAL MATTERS** |  |  |  | **COMMENTS** |
| **Source of other party’s finance** | *Details (e.g. governmental funding, etc.)* |  |  |
| **Annual turnover for other party** | *Provide last 3 years’ turnover* |  |  |
| **Copies of audited accounts provided for the last year** | *Yes/No**Details (any matters of interest or concern)* |  |  |
| **Copies of annual corporate reports provided for the last year** | *Yes/No**Details (any matters of interest or concern)* |  |  |
| **Feedback from Financial Services** |  |  |  |
| **Recurrent funding** | *Indicate whether there is any recurrent funding in place for higher education provision, eg from HEFCE, and if not, what alternative funding streams are* |  |  |
| **Payment arrangements** | *Provide details of the payment arrangements to be set out in the contract, e.g. the University will pay the Collaborating Body 100% of all income, etc.* |  |  |
| **Taxation arrangements** | *Details (e.g. there may be UK or overseas VAT or other taxation costs arising out of this activity)* |  |  |

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| **FUTURE OPPORTUNITIES** |  |  |  | **COMMENTS** |
| **There is the potential for further development in relation to this activity in the following areas** | *Yes/No**Details* |  |  |

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| **OTHER RELEVANT POINTS** |  |  |  | **COMMENTS** |
| **Other relevant points not covered in any other section** | *Details* |  |  |

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| **APPROVAL** |
| **Approved by the Dean of Partnerships** | *Signature* |
| **Date** | *Date* |

1. For UK partners, available at: <http://wck2.companieshouse.gov.uk/ec626cbef7e3ae5c69aa231727fefdac/wcframe?name=accessCompanyInfo> [↑](#footnote-ref-1)
2. The UKBA’s *Register of sponsors licensed under the points-based system* is available at: <http://www.ukba.homeoffice.gov.uk/sitecontent/documents/employersandsponsors/pointsbasedsystem/registerofsponsorseducation> [↑](#footnote-ref-2)
3. The Department for Business, Innovation and Skills website lists ‘all those institutions or bodies, which for the time being, deliver courses that lead to degrees awarded by Recognised Bodies’. This is available at: <http://www.bis.gov.uk/policies/higher-education/recognised-uk-degrees/listed-bodies> [↑](#footnote-ref-3)
4. Prevent Duty Guidance available at: <https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/445915/Prevent_Duty_Guidance_For_Further_Education__England__Wales_-Interactive.pdf> [↑](#footnote-ref-4)
5. Information relating to public bodies may be available at: <http://www.legislation.gov.uk/> or at <http://www.ssm.com.my/> [↑](#footnote-ref-5)