

## Guidance for proposers: Establishing a new Educational Partnership

### 1. Initiation

#### **Responsibility of: The Academic Lead**

An **Academic Lead** must be identified who will lead the development and submission of the proposal. The Academic Lead may be agreed at School/Faculty level, or if the proposal originates from University-level strategic discussions, the PVC Education and Students or their nominee will make a recommendation. A role description of the Academic Lead for an educational partnership can be found [here](#).

The Academic Lead should initiate discussions internally within the relevant School(s) and Faculty(ies) and with the proposed partner, to scope out the partnership arrangement and the anticipated responsibilities of each partner. The Academic Lead will need to clearly articulate the rationale and benefit of entering into a collaboration with the partner in the proposal documentation. At this early stage, we recommend that you notify the [Academic Quality and Partnerships Office](#), who can advise as to whether the University has any existing agreements in place with the partner and provide advice on the likely approval mechanisms required for the proposal. AQPO will also be able to put the Academic Lead in touch with other Professional Services teams that may be able to support the development of the proposal.

The details of the proposed collaboration should be captured in the '[Proposal Form - New Educational Collaborative Arrangement](#)'. Any questions on the form should be directed to AQPO.

### 2. Review

#### **Responsibility of: Academic Lead (with the Faculty Education Team)**

**School and Faculty Review:** Once completed, the form will need to be reviewed by the School and Faculty (if multiple schools/faculties have an interest in the proposal, it will need to be reviewed by all involved). At a minimum, the proposal must be reviewed by;

- Head of School
- Faculty Education Manager
- Relevant Faculty Education Director (graduate or undergraduate)
- Faculty Manager
- Faculty Financial Controller
- Faculty Dean

The Faculty Education Manager will be able to provide advice and support as to how best to coordinate the review process within the Faculty.

It should be noted that if a proposal involves the development of a new programme of study, then the [University programme approval process](#) will also apply. The Academic Lead may wish to seek Faculty approval of the partnership at the same time as seeking approval for the Business Case for a

new programme development, to avoid duplicated effort. Please contact AQPO as soon as possible for advice on this.

Evidence of School and Faculty support should be gathered, either via email or via hard copy signature on the '[signature sheet](#)' provided by AQPO. Proposals for a joint or dual award must be accompanied by a statement from the relevant Faculty Dean(s) confirming support for the proposal and setting out its value to the faculty. Once School and Faculty support has been secured, please email the completed form and evidence of support to AQPO at [educational-partnerships@bristol.ac.uk](mailto:educational-partnerships@bristol.ac.uk).

### 3. Approval

#### ➤ **PART 1: RISK ASSESSMENT**

##### **Responsibility of: Academic Quality and Partnerships Office**

**Due Diligence Checks:** Upon receiving the proposal, AQPO will work with the Academic Lead to coordinate initial due diligence checks on the partner organisation if required, so that the University can assure itself of the suitability of the proposed partner. This will involve the checking of information about the proposed partner's academic, legal and financial standing.

**Risk Assessment:** AQPO will review the proposal submitted by the Faculty and the due diligence information and assess the risk of the proposed partnership to the University. A risk level (low, medium or high) will be assigned to the proposal, which will be endorsed by the relevant Academic Director of Studies.

- Arrangements deemed to be **low risk** are now approved in principle and can move to negotiation and the creation of a written agreement with the partner(s) –see section 4.
- Arrangements deemed to be **medium/high risk** will also require **University level approval** and a greater level of scrutiny will be needed in these cases. Approval at University level is via the Educational Partnerships Evaluation Group (EPEG), or a subgroup of this. **High risk** proposals may also require approval by the PVC Education and Students. Due to their complex nature, proposals for new Joint or Dual Awards will automatically be considered high risk and require further scrutiny.

AQPO will confirm the outcome of the risk assessment with the Academic Lead and confirm next steps. They will also advise the Academic Lead of any additional information / paperwork that may be required for University level approval and can provide guidance on the likely timescales of the approval process.

#### ➤ **PART 2: UNIVERSITY LEVEL APPROVAL**

##### **Responsibility of: Academic Quality and Partnerships Office**

The proposal paperwork for medium/high risk partnerships will be submitted for consideration by EPEG, either electronically or via a face to face meeting – depending on the complexity of the partnership arrangement. If a physical meeting is organised then it is likely that the Academic Lead will be required to attend to present the proposal and answer any questions. EPEG may make one of the following decisions:

- **Approve:** The Academic Lead will be notified that the proposed partnership has been approved, subject to development of an appropriate written agreement (see section 5).
- **Refer:** PPEG may consider it necessary to refer the proposal for further scrutiny by the PVC Education and Students. In these cases, PPEG will provide the PVC Education with a brief evaluation report along with the proposal documentation. If the proposal requires further scrutiny by the PVC Education and Students, this will be coordinated by AQPO.
- **Not approve:** In some circumstances, PPEG may not approve a proposal for an educational partnership. AQPO will notify the Academic Lead of the decision and provide a summary of the reasons for this.

Approval decisions will be reported to University Academic Quality and Standards Committee and upwards to the Education Committee and details of any approved partnerships will be added to the [University Educational Partnership Register](#) at this stage. Following University level approval, an appropriate written agreement can be drafted.

#### 4. Contract

##### **Responsibility of: Academic Quality and Partnerships Office**

All approved educational collaborative arrangements must be underpinned by an appropriate form of written agreement. The process will be overseen by AQPO and the [University Secretary's Office](#) (responsible for supporting legal and compliance matters at UoB) will have a lead role in developing formal documents. The Academic Lead will provide input to and comment on the agreement as appropriate and help facilitate its negotiation with the partner(s). If the partner institution has initiated the agreement, AQPO and the Secretary's Office will need to review this to ensure that it meets the University's own requirements.

The final signed copy of the agreement must be in place **before** the collaborative activity commences, and this copy must be stored in the appropriate designated location - AQPO will provide advice on this.