Operational guidelines for the development of new collaborative partnership arrangements (UK and International) within AP, and to support developments external to AP.

Introduction ........................................................................................................................................ 2
Principles of good collaborative partnership building ................................................................... 3
Stages of development .......................................................................................................................... 4
  1. Initial contact and decision to follow-up with prospective partner ........................................... 5
  2. Initial Review .................................................................................................................................. 8
  3. Agreement Stage. Agreement reached with partner to proceed with a collaborative arrangement under agreed governance from AP SMT ............................................... 10
  4. Developmental phase (1) - ADPC ................................................................................................. 12
  5. Developmental phase (post ADPC) – Stage 1 approval ................................................................. 13
  6. Approval Stage ............................................................................................................................... 15
  7. Operationalisation ......................................................................................................................... 16
Staffing and areas of responsibility ..................................................................................................... 17
  Staff functions and support within Academic Partnerships .............................................................. 17
  Key contacts and sources of advice across PU................................................................................... 18
Documentation ...................................................................................................................................... 18
Appendices .......................................................................................................................................... 21
  1. Flow Chart for new partner process within AP ........................................................................... 21
  2. Flow Chart for partnership approval ............................................................................................ 23
  3. RDM Job Description .................................................................................................................... 24
  4. MoU commitments ......................................................................................................................... 27
Introduction

This handbook (as at October 2015) is designed to support the process of making new collaborative partnerships. It adds detailed guidance and support to existing processes, providing operational and contextual explanation of the steps within the new partnership development process. It complements the guidance document: Governance of academic partnership activity, and the approval processes outlined in that document. It also adds operational detail to the document: Roles, responsibilities and expectations for governance of partnership activities. It should be used as an aide-memoire for the development of any collaborative partnership whatever the size or location.

AP manage collaborative delivery with both UK and international partners and have developed processes for approval and quality assurance which meet PU requirements whilst also being cognisent of the needs and circumstances of partnership work. For large partnerships and those that offer a range of subject areas across faculties and schools AP will normally be responsible for governance.

Each partnership will be different and the process of development should be appropriate to each proposal. Key roles and responsibilities are identified within this handbook, and these roles will be assigned within the development of any new partnership. The Project Manager / Project Board Chair / Relationship Development Manager in each case needs to apply professional judgement to the contextual circumstances in each partnership development. Establishing effective communication with faculties/schools in the development of partnerships and in establishing a clear delineation of shared responsibilities is a part of this process. We can identify important principles as part of this process and these should be considered throughout the development of each collaborative partnership. This handbook also identifies staff and their responsibilities within Academic Partnerships (AP) who provide support in the development of partnerships. Others across the university who are experienced in partnership work and can provide advice and guidance are also identified.

The Central Quality Office (CQO) is a part of AP and works with the UK and international partnership functions to ensure that university requirements are co-ordinated with partnership development and operation. The Quality Handbook provides more detail of approval processes and requirements.

The guidance within this handbook will be updated periodically to reflect university change and to draw upon experience and practice.
Principles of good collaborative partnership building

*Communication*

Listening, and understanding the partner perspective.

Engaging in open dialogue with the partner which enhances their understanding of the university and how partnership agreements are constructed and operationalised.

Promoting cultural and sector awareness through communications with partner and stakeholders.

Providing an inclusive perspective which recognises the wider university community and need for open engagement.

Providing a clear narrative of the partnership development from start to finish.

*People and Management*

Identification of key personnel and responsibilities for partnership in both organisations.

Engagement in detailed discussions with partners relating to the levels of resourcing required to develop and maintain the partnership.

*Strategy*

Identification of strategic alignment between university and partner.

Developing awareness of short and long term potential of each partnership.

Open discussion of areas where organisations may choose not to collaborate, or be in competition/have other partnerships.

*Clarity of purpose*

Identification of service expectations from both partners.

Explanation of the purpose of documentary processes and demonstrate consistency in application.

*Contextualisation*

Developing an understanding of the context of each collaborative provision.

Management of process in an appropriate and constructive way which recognises that a partnership may operate in a non-standard way, whilst also meeting expectations.

*Objectivity*

Seeking the involvement of appropriate staff in order to provide scrutiny, support and consultation.

Negotiating changes in proposals with appropriate consultation.

Responding to due diligence concerns, and demonstrating a proportionate evaluation of risk and the management of risk.
Stages of development

1. Initial contact
- Enquiry management - see flowchart Appendix A
- Initial partnership profile evaluated.
- Initial visit/discussions with partner.

2. Initial review
- AP SMT in consultation with faculties decide on the management and governance of the proposal.
- Head of UK/International scope financial and staff commitments of proposal.
- SMT Agreement to proceed
- Project Manager to be assigned (AP SMT).
- Faculty/School sponsor(s) identified.
- Set up Project Board (if appropriate)

3. Agreement to proceed
- Visit to potential partner by Project Manager and Academic Liaison.
- Negotiate timeline for development.
- Memoranda of Understanding signed
- Due Diligence (Legal, Financial and Reputational) - Academic ongoing.
- Draft financial model
- Complete paperwork for ADPC (Proposal for new collaborative provision or ICAR parts A-D)

4. Developmental phase (1) ADPC
- ADPC approval
- ACA template and development
- Negotiation of timeline for partnership and award approvals.
- Due Diligence (Legal, Financial and Reputational) - Academic ongoing.

5. Developmental phase (post ADPC), Stage 1 Approval
- Stage 1 approval
- Development of ACA
- Relationship Development Manager appointed if not already in post.

6. Approval Stage
- Partnership and programme approval
- ACA signed

7. Operationalisation
- Action plan for approval conditions
- Implementation of partnership arrangements
- Academic and administrative training plan

Main Driver

UEG or AP/Faculty

AP SMT

Sponsor of proposal (AP/Faculty)

Project Manager (with support from Academic Liaison)

Finance BP/Management Accountant

Project Manager (with support from Partnerships Administrator

Finance BP/Management Accountant

Head of Partnership Operations

Project Manager

RDM

Project Manager

RDM

Head of Partnership Operations

RDM

Head of Partnership Operations
1. **Initial contact and decision to follow-up with prospective partner**

*Potential Main actors:*

Dean AP, Head of UK/International, UEG, Faculty/School, as initiator.

*Criteria for successful completion of this stage and movement to next stage:*

Initial judgments to be made in relation to suitability of the prospective partner and the potential viability and success of the proposal.

AP has developed two initial partnership enquiry templates which are located on the website and also sent out to partners if an enquiry is made to the AP office or to Head of UK/International Partnerships. One is for prospective partners in the delivery of awards and the other is for potential progression partners (Documents section, no 1 and 2).

The templates can be used in a number of ways:

1. Sent to the partner for them to complete and return
2. Used as guidance for initial discussions
3. Used to gather materials about the partner and the profile of the partner.

The templates have been developed as a basis for engaging in initial dialogue with the prospective partner. They are not designed to be prescriptive but provide an opportunity to make some early decisions about the feasibility of the partnership for both parties and provide criteria for a prospective partnership development to be reviewed.

*Timings and potential actions:*

- Evaluation of initial profile/contact – AP partner profile templates
- Initial research on prospective partner and previous partnership history. As well as internet searches and using established contacts and networks it is also worth remembering that other schools within the university may have had previous experience of working with this organisation.
- Faculty initiators of potential new partnerships should contact AP (Head of UK, for UK partnerships and Head of International, for International partnerships), to discuss potential developments and to formally start the process.
- Initial visit/discussions with partner as appropriate. This may be a good place to use the partner profile templates as a basis for discussion. Discussion should provide focus on whether PU strategies and the potential partners’ strategies are comparable and the nature of collaborative working at PU. Issues such as access to e-resources, staff support from PU and staffing at the partner institution, awards, quality assurance and quality enhancement, student experience, and physical resources and environment should be discussed in order to gain a clearer understanding of what expectations the prospective partner has. Long term projections for student numbers, growth and marketing should also be subject to initial
discussion. Existing arrangements including financial models should be explored as a basis for initial financial projections.

- Evidence and narrative based on the initial partnership template to be provided to Head of UK or Head of International for review on whether to take proposal further. In such cases the proposal should receive an initial review by the New Partnerships and Transfer Project Board. The board will be able to provide additional considerations and recommendations on the proposal for SMT.

- Agreement to proceed to be discussed by SMT (within AP the appropriate Faculty Partnership Managers should be informed and consulted on the proposal and may be able to carry out some aspect of this stage as well as support early discussions with schools/faculties likely to be involved in the proposal). This may be made in principle as a basis for further investigation/discussion with prospective partners, or as a formal decision to proceed with partnership development.

- Decision should be made whether to take proposals that have come directly into AP ahead for consultation with schools/faculties and ultimately ADPC.

- Identify potential range of faculty/school actors and begin consultation as appropriate.

- Communication with partner of this decision. Potentially there may be decisions made not to proceed in any form of collaboration with this prospective partner; however there may also be scope for revisiting the original proposal and creating a plan for a lower level engagement which may be the precursor to more substantial engagement. In these situations the approach from AP is to stress the long-term strategic commitment that we take when developing any partnership. We may also reflect on our capacity to manage a particular partnership where we have no experience in that form of operation – in such cases particular attention needs to be made in assessing and potential to manage risk.

- Discussion with prospective partner about expectations of working in partnership. Overview of processes of approval and realistic timelines.

**Documentation produced from this stage:**

- Follow up notes, actions and information made from the initial partnership profile and discussions. (Proposal sponsor/nominee)

- Partnership development narrative to be started. It would be useful to start a short narrative commentary on actions and observations and agreed next steps. This will be a useful tool for recording the partnership development and also capture more informal discussions and agreements that may not be officially documented in meeting minutes (such as decisions made as a result of consultations via e-mail and phone). (Proposal sponsor/nominee)

- Report based on Initial Partnership Templates with supporting evidence (academic, financial, legal, reputational) to be produced for New Partnership and Transfer Project Board AP SMT via Head of UK or Head of International. This will constitute an initial stage of due diligence review.
  - Indicative headings for reporting to SMT
    - Source of enquiry
    - Projected student numbers, awards and subjects, financial models
    - Current provision and rationale for partnership with PU
• Preliminary findings from initial Due Diligence searches

_Indicative responsibility:_ Proposal sponsor/nominee. Head of UK / Head of International
2. **Initial Review**

*Main actors:*

Anyone submitting proposals.

AP SMT

*Criteria for successful completion of this stage and movement to next stage:*

Agreement to proceed/reject from AP SMT.

Agreement on a basis for proceeding gained by Dean AP from other Dean’s/UEG (as appropriate).

AP SMT to examine:

1. The ability of the University to devote sufficient time and resources to making any collaboration a success

2. Where the potential collaboration sits within the current and future set of opportunities being considered by the University.

3. Costs, benefits and risks attached to the proposal.

*Timings and potential actions. AP SMT will:*

- Make initial decisions on the management and governance of the proposal.
- Make recommendation on the formation of a project board and membership.
- Identify a prospective Project Manager to be assigned or confirmed as appropriate. The Project Manager may be the initial instigator or may be from within AP, depending on scale of project. A potential future Relationship Development Manager/ALP may also be identified who will act as the main point of contact for the partnership where necessary (the RDM may be from within AP or a Faculty appointment). This person will work closely with AP in both the development of the partnership and the implementation and running of the partnership. The Project Manager and RDM will work closely in the development of the partnership.

*Dean AP will:*

- Consult (or delegate consultation) with other Dean’s and OVC as appropriate.
- Consult with appropriate Dean (s) to identify a faculty/school sponsor (s) as appropriate for the partnership, responsible for managing communication and actions within the faculty/school.

*Subsequently, Head of UK / Head of International will:*

- Brief the designated Project Manager (where not already involved) on the background of the new partner and basis of initial agreement.
- Clarify management and reporting structure for the project.
Other actions at this stage:

- Any outstanding issues or actions from SMT to be resolved before proceeding.
- To scope financial and staff commitments of proposal.
- To communicate any decision to the partner.
- To agree on process, level and timing for financial statements and due diligence checks. The UUK document: International Partnerships: A Legal Guide for UK Universities provides a good overview of these processes and illustrative case studies as well as a specimen due diligence questionnaire [http://www.international.ac.uk/research-and-publications/research-and-publications.aspx?page=1&category=Legal Series](http://www.international.ac.uk/research-and-publications/research-and-publications.aspx?page=1&category=Legal Series). (You will need to register using your PU e-mail account). This should be actioned before signing any MoU. Whilst a MoU does not commit the university to partnership it does signal intent and the sequence for agreement of intent should be considered in light of the particular circumstances of the proposed partnership. A MoU is not legally binding, however careful wording is necessary and reference should be made to the governing law for the MoU, which ideally is English. (Documents section, no 3). See Appendix 4. MOU commitments.
- To discuss the pedagogic viability and feasibility of the potential partnership. Considerations that relate to Academic due diligence such as ownership and development of the curriculum and the capacity to support the curriculum should be considered.
- Agreement should be gained for a visit to partner by appropriate PU staff to start sufficiently detailed discussions for the proposals (a checklist of outcomes may be useful in creating a shared understanding of PU requirements).
- A visit to the partner should incorporate an initial review of facilities. AP has a site approval checklist template which should be the basis of this review (Documents section, no 4).
- Updates on progress should be made to New Partnerships and Transfer Board Board until a Project Board is established.
- International proposals will additionally need to comply with sections 1.4, 1.5, 1.6 of the document: Approval of a New Collaborative Overseas partner (Documents section, no 5).
- Start process of identification/appointment of RDM/ALP as necessary. This may involve cross over with the appointment of school/faculty sponsors of the partnership.

Documentation produced from this stage:

Proposals to AP SMT/Board. It would be good practice to outline the areas above as part of any initial proposal and identify any areas of priority that should be addressed on moving to the next stage. These can be integrated into a partnership development narrative and documentation developed in stage 1.

*Indicative responsibility:* Proposal sponsor/Project manager
3. **Agreement to proceed. Agreement reached with partner to proceed with a collaborative arrangement under agreed governance from AP SMT**

**Main actors:**

Dean AP, Head of UK/International, Project Manager, RDM, Academic liaison/FPM/IPM, Faculty/School sponsor (s), Quality office nominee, Finance BP, ERCS BP, Head of Partnership Operations, University Solicitor, Administrator (Partnerships).

**Criteria for successful completion of this stage and movement to next stage:**

- AP to be fully satisfied that resources can be committed to the potential development of a new collaborative arrangement.
- Satisfactory progress with academic, financial and legal due diligence.
- Memoranda of Understanding (MOU) signed.

**Timings and potential actions— responsibility generally held by Project Manager:**

- Visit to potential partner by Project Manager and RDM/FPM/Academic Liaison:
  - Explain PU processes and requirements.
  - Negotiate timeline for development.
  - Confirm developmental arrangements within this timescale and discuss needs for AP and new partner.
  - Agree on a communication strategy and information sharing arrangements (i.e. Dropbox, Video/Tele-conferences)
  - Discussion of the processes for approval with partner and substance/structure of the proposal.
  - Confirmation that the new partner has an understanding of the resourcing and exact requirements that successful completion of partnership will require.
  - Identify key personnel within partner organisation.
  - Identify documentation that partner will need to provide for next stages of development.
  - Identify documentation that PU will need to provide to partner. This will include guidance on programme and module design and PU policies (Documents section, no ...).
  - Discussion and agreement of the terms that will be included in the MoU. This should include a discussion of the principles of good collaborative partnerships and specific commitments based on these principles as exemplified in Appendix 4.
- Staff development needs/additional personnel and expertise are identified with timeline for delivery.
- Appropriate levels of liaison staffing to be identified by head of UK/International and project manager and Faculty sponsor (s) including project administrator where required.
• Project Board convened where appropriate. Chair of Project Board to be confirmed – will be drawn from AP. Checklists from New Partnerships and Transfers Board can be used for early development work.
• Financial model should be considered in light of academic and QA requirements for supporting partnership.
• QA model to be designed in consultation with AP academic team.
• Project Manager to lead on the completion of requirements for ADPC. Decide on staff responsibilities for review of documentation within AP academic team. Check ADPC deadlines for submission to AP for review.
• MoU agreed and signed.
• On signing of MoU further Due Diligence procedures should be confirmed and initiated. Academic Due Diligence is based on systematic inquiries and evaluations on the capacity of the partner to meet learning outcomes. This can be primarily met through normal stages of programme development with the partner and the cognate specialists who can advise in this area. A high level of academic commitment and involvement is required to make these judgments, although overall, the decisions that are made on the partnership development should be made not by an individual academic, but via a PU process that provides independent scrutiny. Identification of risk is necessary and a clear process of managing this risk is required, i.e. the risk of failure and need to provide alternative arrangements for students. See QAA Quality Code B10 – Indicator 9 refers to the need to manage contingency plans using protocols as would be applied for in-house students. PU should also reflect upon its capacity and experience to manage this kind of development as is indicated in the Quality Code B10, Indicator 5. Legal and Financial Due Diligence checks should be put in place and evaluated.
• Start consultation on ACA with Head of Partnership Operations.

Documentation produced from this stage – and indicative responsibility:

Draft ADPC documentation (including business plan)
Partnership narrative
MoU
Draft ACA started
Action Plan
Site Visit Report

Indicative responsibility: Project Manager and RDM
4. **Developmental phase (1) - ADPC**

*Main actors:*

- Project Manager, RDM, Quality Office nominee, Academic liaison/FPM, Head of Partnership Operations, QA Partnerships Co-ordinator, Partnerships Development Co-ordinator, Programme Administration Manager, with AP Business Partner/Management Accountant, Administrator (Partnerships)

*Criteria for successful completion of this stage and movement to next stage:*

ADPC approval

*Timings and potential actions – responsibilities to be confirmed as part of the management process:*

- Discussion and structure of the partnership in terms of academic viability – project board to be involved where appropriate.
- Confirm model of partnership (institutional taxonomy) and award typology (programme level) and the QA model and management and governance of the partnership.
- Establish Faculty involvement and identifying costs with AP Management Accountant and Head of Partnership Operations.
- Negotiation of preliminary timeline for partnership and award approvals with Central Quality Office. ADPC date identified.
- Developmental work with partner based around ADPC requirements and new partner process. UK – Approval of a New Partner Institution (UK), p2 provides guidance of the range of documentary evidence to be considered in the approval of a new partner (Documents section, no 6).
- Potential regulatory changes identified.
- Implementation of actions agreed in stage 3 (Action plan).
- All preparation for ADPC complete and reviewed by nominated staff.
- Review of ADPC documentation by AP SMT.
- Submission of ADPC documentation.

*Documentation produced from this stage:*

Complete ADPC documentation:

- International – Parts A-D of International Collaborative Approval Report (Documents section, no 7).
- UK – Proposal for a new UK Collaborative partner (Documents section, no 8).

*Partnership narrative*

*Action plan*

*Indicative responsibility:* Project Manager, RDM
5. **Developmental phase (post ADPC) – Stage 1 approval**

*Main actors:*

Project Manager, RDM and Faculty/School sponsor (s), Quality Office nominee, Academic liaison/FPM, Head of Partnership Operations, QA Partnerships Co-ordinator, Partnerships Development Co-ordinator, Programme Administration Manager, Administrator (Partnerships)

*Criteria for successful completion of this stage and movement to next stage:*

UK/International – Stage 1 approval event – partnership and programme (run as AP internal scrutiny process).

Official Stage 1 New Partner Approval -run by CQO for new UK partnerships (Documents section, no 6).

*Timings and potential actions:*

- **Programme development:**
  - Awards named/identified.
  - Any transitionary or APL arrangements identified.
  - ALP/FPM liaison and review of formative documentation.
  - Special requirements identified and specialist staff involved.
  - Interim timetable for liaison activities.

- **Partnership development:**
  - Operational and administrative actions and schedule confirmed (to cover aspects such as application, enrolment, panels and boards, finance).
  - Development of the Academic cycle for the new partnership (where it does not fit into standard UK academic year).
  - Development of a responsibilities document outlining PU and partner responsibilities within the proposed arrangements.
  - Writing of ICAR (International partnership approvals) and identification of additional approval documentation.
  - Writing of Approval documents (UK partnership approvals).
  - Partnership responsibilities and governance arrangements confirmed -including quality review and monitoring procedures. These should be outlined in the Operational Specification and will need to be confirmed with Head of UK / Head of International.
  - Further development to ACA template
  - Student liaison planned where necessary (including transitional arrangements).
  - PU student support services confirmed.
  - Financial model for operation agreed including budgeting for post approval support.
  - Identification of any resourcing issues and actions agreed.
  - Identification of staff development and training requirements and actions agreed.
  - Consideration of regulatory changes required and any cost/resourcing implications.
• Staffing requirements considered including the levels required for this project and nature of RDM and ALP roles and adjustments necessary to job descriptions:
  o ALPs/I-ALPs identified
  o Administrative support needs finalising with Head of Partnership Operations – NB this should have already identified and included in financial model
• Approval arrangements:
  o Dates and staffing for stages 1 and 2.
  o Confirmation of paperwork requirements, deadlines and responsibility (AP or CQO) for different stages.
  o Logistical arrangements.

**Documentation produced from this stage:**

Documentation for stage 1 events.

Reports from stage 1 events, including conditions and recommendations from panels.

Action Plan from stage 1.

Partnership narrative.

Timeline for stage 2 approvals.

ACA template

**Indicative responsibility:** Project Manager, RDM, Head of Partnership Operations
6. **Approval Stage**

*Main actors:*

Project Manager, RDM, Quality Support, Key Account Manager/Academic liaison/FPM, Head of Partnership Operations, QA Partnerships Co-ordinator, Partnerships Development Co-ordinator, Programme Administration Manager, Administrator (Partnerships)

*Criteria for successful completion of this stage and movement to next stage:*

Successful approval event – partnership approval and award approval.

Partnership agreement signed

*Timings and potential actions—responsibilities to be confirmed as part of the management process:*

- Refinement of partnership arrangements post stage 1.
- Refinement of programme documentation post stage 1.
- Sign-off from Stage 1 chair(s) that conditions set at stage 1 have been met.
- Work with CQO to confirm approval arrangements and requirements.
- Planning of operational/administrative actions.

*Documentation produced from this stage:*

Partnership and programme approval documentation

Post approval action plan

Partnership narrative

*Indicative responsibility:* Project Manager, RDM, Head of Partnership Operations
7. **Operationalisation**

*Main actors:*

RDM/Academic liaison/FPM, Partnerships Operations Manager, QA Partnerships Co-ordinator, Partnerships Development Co-ordinator, Programme Administration Manager, Administrator (Partnerships)

*Timings and potential actions – responsibilities to be confirmed as part of the management process:*

- Post approval conditions – action plan and responsibilities devised by partner in collaboration with RDM
- Final versions of revised documentation – no longer subject to approval
- Confirmation of staff development and training schedules to support new partner
- Operational student support actions implemented
- Administrative and operational arrangements implemented
- New developments and further collaboration discussed

*Documentation produced from this stage:*

Final and revised versions of approval documentation.

Programme handbooks

Module handbooks

Final academic cycle planner

Guidance documentation and supporting material for administrative processes

On-going schedule of staff development and training

*Indicative responsibility: RDM, Head of Partnership Operations*
### Staffing and areas of responsibility

#### Staff functions and support within Academic Partnerships

<table>
<thead>
<tr>
<th>AP staff with development responsibilities</th>
<th>Functions within development stages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Head of UK – Mark Stone</td>
<td>Initial negotiation/project management. Leads AP Academic Team.</td>
</tr>
<tr>
<td>Head of International – Peter Ingram</td>
<td>Initial negotiation/project management</td>
</tr>
<tr>
<td>Head of Partnership Operations – Claire Deacon</td>
<td>Management of resourcing and implementation of partnership operations, including academic co-operation agreements.</td>
</tr>
<tr>
<td>Partnerships Development Co-ordinator – Claire Gray</td>
<td>Support with training and development for partnership development and operationalisation. Potential AP Project Manager or support for RDM/Project Manager and can be assigned as RDM. Chair of New Partnership and Transfer Board. AP Academic Team.</td>
</tr>
<tr>
<td>QA Partnerships Co-ordinator – Julie Swain</td>
<td>Support for all aspects of student experience and liaison with student services including library and student e-resources. Can be assigned as RDM. AP Academic Team.</td>
</tr>
<tr>
<td>International Partnerships Manager – Chris Andrew</td>
<td>Development and support of international partnership relationships. Potential AP Project Manager or support for RDM/Project Manager.</td>
</tr>
<tr>
<td>Faculty Partnership Managers – Mark Glasson, (Education), Chris Groucutt (Arts and Humanities), Ross Pomeroy (Science/Technology/Engineering), Pam Whisker (Business and Social Science)</td>
<td>Quality assurance and management of partnerships in cognate areas. Can be assigned as RDM. AP Academic Team.</td>
</tr>
<tr>
<td>Administrator (Partnerships) Appointed for each partnership</td>
<td>Support in the administrative development of new partnerships.</td>
</tr>
<tr>
<td>Programme Administration Manager – Carol McAllister</td>
<td>Oversight of the process of new partnership development.</td>
</tr>
</tbody>
</table>

### Allocation of responsibilities

<table>
<thead>
<tr>
<th>Functions within development of collaborative arrangements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Academic liaison</strong></td>
</tr>
<tr>
<td>Faculty staff – brought in to advise in cognate areas of programme planning. Academic liaison for partnership where necessary (not necessarily the same staff member(s), or teaching responsibilities.</td>
</tr>
<tr>
<td><strong>Relationship Development Manager (see appendix 3)</strong></td>
</tr>
<tr>
<td>The main academic liaison for the partner once approval is gained – could be AP or Faculty.</td>
</tr>
<tr>
<td><strong>Project Manager E.g. Head of UK/International Partnerships, International Partnerships Manager, assigned AP member of staff (including FPMs or Partnerships Development Co-ordinator)</strong></td>
</tr>
<tr>
<td>Needs to be able to see the bigger picture but also hands-on co-ordinate and agree actions and responsibilities of others including academic liaison and administrative function where this is carried out within AP. Will probably hold</td>
</tr>
</tbody>
</table>
Key contacts and sources of advice across PU:

**CQO**

Lynn Harvey can provide advice on partnership and programme approval events and documentation.

**Faculty Contacts**

Faculty of Business: Dulekha Kasturiratne is the RDM for the Sri Lanka partnership and has extensive experience in the development and operation of a new international partnership.

Faculty of Arts: Colin Searls has experience of working on a new partnership with an Indian institution and has worked for many years with partner institutions in a UK context.

**Documentation**

**Supporting documentation for handbook.**

**Numbers in brackets correspond to references in Handbook.**

**Quality Handbook**

University Planning Process document

Approval Process

**Partner Processes Section of Quality Handbook**

International Articulation Agreement

Collaborative overseas partner (5)

Approval of new UK partner (6)

**Key Forms and Guidance – links from Quality Handbook**
International Collaborative Approval Report (7)

Pro-forma for new UK Partnership (8)

AP Website

Initial partnership enquiry template (1)

Progression partner template (2)

http://www1.plymouth.ac.uk/academicpartnerships/Pages/Becoming.aspx

PU guidance on Teaching and Learning

Designing your Programmes and Modules – Guidance Notes

http://www1.plymouth.ac.uk/ouruniversity/teachlearn/guidanceresources/Pages/programmesandmodules.aspx

Personal Tutoring Resources

http://www1.plymouth.ac.uk/ouruniversity/teachlearn/guidanceresources/Pages/personaltutoring.aspx

Assessment Resources

http://www1.plymouth.ac.uk/ouruniversity/teachlearn/guidanceresources/Pages/Assessment.aspx

PU Vision and Strategies

University Policies

http://www.plymouth.ac.uk/pages/view.asp?page=1236

Teaching, Learning and Student Experience Strategy 2013–2020

http://www1.plymouth.ac.uk/ouruniversity/teachlearn/Pages/default.aspx

Other documents available through AP.

Site visit template (4)

Sample MOU (3)
Appendices

1. Flow Chart for new partner process within AP

Appendix 1: New Partner Process: A) Enquiry

* If enquiry first raised at SMT, Head of Partnerships Operations to inform PAM for log update
(SofD1)

New Partner Process Appendix 1A

In Partner Colleges/New Partners/folder on H Drive
1. Sections A-H of the New Partner Enquiry Log, (enquirer’s details) completed on relevant worksheet – International or UK.

2. If enquiry was received via email/letter, enquiry should be saved in the Correspondence folder using the naming convention: 13.25.07 Email from UK College of Business. Column I of Enquiry Log to be updated with “Copy of Email/letter on H:drive” and Column J with I or UK depending on nature of enquiry

3. Enquirer sent / or emailed (email preferable) New Partner letter template and the 2 forms: Information to Assist Enquiries from Potential PU Collaborative Delivery Partners/Progression Partners (both of which contain Partner Criteria). Date letter/email sent recorded in column K of Log (no need to keep a copy of the letter).

4. Head of UK or Head of International Partnerships sent email notifying them of enquiry and date that acknowledgment sent (Partnerships Operations Manager and Administration Manager cc’d in for information (as well as Partnerships Administrator if enquiry is International). Date email sent to Head to be recorded in column L of Log.

Note: if enquiry is received direct from Head of UK/International Partnerships – need to inform PAM/Admin Office for log update and process as necessary

AP Generic Admin Team

Head of UK/Head of International Partnerships

SofD_ = Stage of Development Level
2. Flow Chart for partnership approval

Appendix 2: New Partner Process: B) Partnership Approval

Approval Process

Yes

No

International

Authorised ICAR sent to ADPC Secretary 2 weeks before meeting

ADPC approves partnership to proceed in principle?

Authorised Proforma sent to ADPC Secretary 2 weeks before meeting

Maybe

Refer back to enquirer for further info for ADPC

Decision communicated to enquirer via telephone call and written confirmation

Agreement template issued in draft Project Board convened (if not already in place)

Maybe

Yes

Project Board Meetings commence

1. Series of Project Board meetings diarised

2. Intranet community, in line with agreed standard format, established for sharing of information with Board members

Project Board Members

AP Administrator

Head of UK/Head of International Partnerships

Relationship Development Manager/Project Lead

AP Academic Team

Yes

No

Project Board

5th/6th onwards

1. Specific Project Board membership (from Terms of Reference) conveyed to AP Administrator

2. RDM appointed

UK

Proposal for New Collaborative Provision Pro formas

Proposal to go to ADPC via...
3. RDM Job Description

Role: [Partnership] Relations Development Manager

Grade (Dependent upon assessed scale, complexity and risk of partnership)

Reports to: Head of School or; Head of UK HE Partnerships or Head of International Partnerships

Functional links: Head of School, Associate HoS, ADTL, ALPs or Head of UK HE Partnerships, Faculty Partnership Managers, ALPs, ADTLs, Heads of School or Head of International Partnerships; International Partnerships Manager; Faculty Node Leaders

Role Summary: [for named partner]

The role holder will take overall responsibility for the management and development of the collaboration with a named partner institution(s), UK or International, in conjunction with the Faculty/School or Academic Partnerships and for the development of the profile of the University in the region and or country of the named partner(s).

The role holder will manage the relationships with senior managers, academics and key support staff at a named partner(s) and other key stakeholders as required to ensure effective links are established and maintained with colleagues in Faculties and Academic Partnerships to ensure that approval and quality procedures are followed.

Ensuring all staff associated with a new or existing named partnership are clear on their part in delivering results and are set up for success, and understand that through their activities each individual contributes to a positive student experience, supporting students throughout their journey, from enquiry to alumni, providing a culture that engages students as genuine partners WITH Plymouth University.
Key Accountabilities:

- To lead or assume responsibility for piloting institutional partnership agreements from initial contact to conclusion.
- To lead, where required, any associated Project Boards related to the named partner.
- To be responsible for contributing to the successful implementation of Project Plans associated with the named partner.
- To contribute an Academic perspective to the operation of relevant project boards.
- To work with PU colleagues to ensure that staff and systems/processes at the named partner are effectively connected to PU.
- To assist with the coordination of marketing and public information related to the named partnership.
- Overall academic responsibility for the development and management of the relationship with the named partner and the profile of PU in the region and/or country of the named partner.
- To work with PU colleagues in the on-going monitoring of institutional relationships and Quality Assurance and to assist with any interventions required.
- To actively seek opportunities to develop and increase the scope of the partnership where in line with Academic Partnerships strategy and to work with PU colleagues to ensure that any development proposed by the named partner are handled in professional and timely manner.
- To ensure that relevant developments at PU are brought to the attention of key staff at the named partner institution in a timely manner.
- Provide a key point of contact for the senior academic team at named partner, ensuring effective links with colleagues in Faculties and Academic Partnerships.
- To provide the Academic Partnerships Board with an Annual report on the relationship with a named partner.
- For international partners, liaison with the British Council and other key in country stakeholders.
- Input to the due initial due diligence/assessment of potential partnerships.
- To share knowledge and experience of partnership working within school/faculty/University as required to aid the development of new partnerships.
- To actively promote partnership working with PU to internal and external audiences.

Measures of Success:

- Successful delivery of key priorities and objectives agreed as part of the University’s Performance Development Review.
- Successful delivery of project boards/plans associated with the named partner.
- Successful on-going operation/growth of partnership activity.
- Demonstrable contribution to partnership working within school/faculty/University.
Qualifications

- Educational attainment at higher education level (or demonstrable equivalent experience)

Skills, Experience, Knowledge:

- Excellent communication – verbal, written, presentations
- Analytical and results orientated
- Leading and Managing People
- Project Management
- Negotiating and influencing
- Computer literate
- Strategic management
- Experience of monitoring and evaluating HE programmes delivered in a partnership context
- A proven record of success in the support of quality assurance and enhancement work
- Willingness to travel as required

Plymouth University’s Values-Based Behaviours:

- Demonstrating self-leadership
- Engaging and developing others to deliver
- Leading in situations characterised by ambiguity
- Building and securing value from relationships
- Driving innovation and action
- Creating a shared vision
- Demonstrating sound business judgement
Appendix 4. MoU commitments

In discussion of the principles on which the partnership is based some commitments should be agreed which should form the basis of the MoU. Whilst the MoU is not legally binding it can be used to define the parameters of expectations for those involved in the partnership. These should be specific wherever possible and used as a measure of progress in the development of the partnership.

i.e Principle: Identification of key personnel and responsibilities for partnership in both organisations.

Engagement in detailed discussions with partners relating to the levels of resourcing required to develop and maintain the partnership.

Expectation that may form part of the MoU: Partners will inform each other of any changes to personnel that affect the development of the partnership and maintain any specific resourcing that has been agreed is necessary.

i.e Principle: Identification of service expectations from both partners.

Explanation of the purpose of documentary processes and demonstrate consistency in application.

Expectation that may form part of the MoU: PU will organise and provide partner and award approval events in line with an agreed timetable of development. PU will provide appropriate academic liaison, guidance and advice in preparation for approval. The partner will ensure that staff are given time and resource in preparation for approval.

Where there is a concern that expectations are not being met on either side, a review of the progress and continuation of the partnership development will be reviewed by the project board.