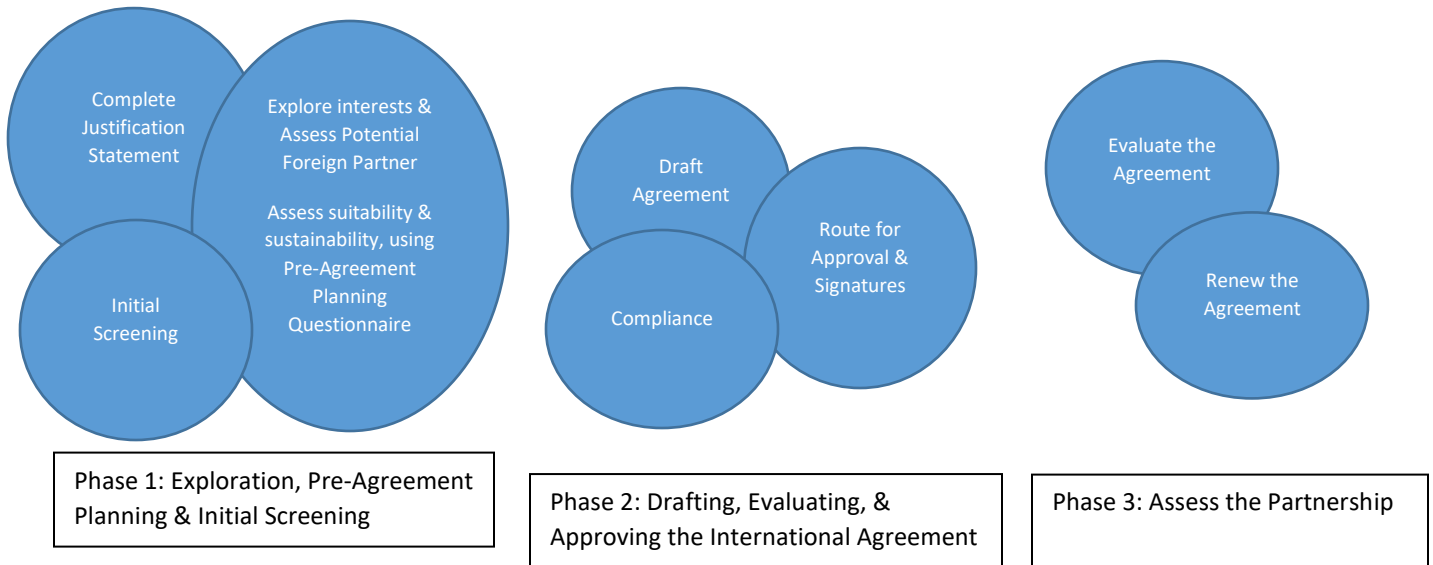


The general procedure for creating a collaborative agreement with a university or institution abroad is as follows:



Phase I: EXPLORATION, PRE-AGREEMENT PLANNING & INITIAL SCREENING

Step 1: Agreement Initiator Consults Supervisor

In the process of establishing a formal international agreement, you should first consult your department head, school or unit director, college dean or other campus officials, as appropriate. If you are unsure whom to contact, each college has designated a representative that provide information regarding their units procedures. The list of College Representatives is available at <http://globalsupport.tamu.edu/Global-Partnerships/External-Links/College-Representatives>. Share your interests and insights about the institution abroad, as well as what you believe may be the potential benefits and expected outcomes for Texas A&M University.

Step 2: Agreement Initiator Responsibilities

You can review the list of active Texas A&M international agreements at <https://tamu.moveon4.com/publisher/1/eng>. If the institution (with whom you are interested in developing an agreement) is not on the list, the next step in the process is to evaluate the institutional fit between Texas A&M and the proposed foreign partner.

Each college has appointed a faculty member on the Faculty Senate Sub Committee, International Programs Committee (IPC). This representative is available to help any faculty within their college to assist in the development of international partnerships.

Areas of consideration:

- A. Alignment with Texas A&M Vision & Goals**
 - Strength of alignment with Texas A&M vision and goals and the corresponding Texas A&M vision and objectives
 - Articulation of learning, academic, and/or research objectives to be achieved through the potential partnership
- B. Academic Parity**
 - Ranking and accreditation of the international institution
 - Articulation of the value added to the existing academic / research curricula of Texas A&M
- C. Sustainability**
 - Fiscal resources available to engage in the international partnership
 - Strength of interest and recruitment methods to support levels of participation
 - Articulation of evaluation mechanisms to determine the success of the partnership
- D. Intellectual and Geographic Diversity**
 - The geographic diversity of the partnership in relationship to existing partnerships
 - Diversity in enrichment experiences and in courses offered
- E. Academic Requirements**
 - Strength of pairing between existing Texas A&M degrees and those of the international institution
 - Strength of pairing between existing Texas A&M academic requirements and those of the international institution

Step 3: Submit the Justification Statement (JS)

A. After assessing the institutional fit, please complete and submit a Justification Statement (JS) . Send the JS to globalsupport@tamu.edu, and PPO will be in contact to discuss initial plans for engagement and provide logistical support. PPO works with the Texas A&M University Office of the Vice President, Export Control Office for Research to complete a comprehensive initial screening on the proposed foreign partner, which consists of two primary checks:

- To ensure compliance with the United States Export Control Laws and Regulations - For more information, visit <https://vpr.tamu.edu/resources/export-controls> and <http://www.bis.doc.gov/>.
- To ensure that the country is not on the Department of State Travel Warning List. For more information, visit <http://travel.state.gov/content/passports/en/alertwarnings.html>.

B. To renew an agreement nearing the end of its term, the agreement initiator must submit a new JS. Note, any changes or new developments in the collaboration. If the renewal is for a student exchange, exchange data must be included in the JS.

C. Renewal Deadlines for Reciprocal Education Exchange Programs (REEPs)

If a current Reciprocal Educational Exchange Program (REEP) agreement will expire during the time a student could be outbound, the deadline for a fully executed renewal agreement is the student study abroad program application deadline. Generally, these deadlines are as follows:

- Spring Exchange deadline = Sept. 15 prior to the spring semester of intended exchange.
- Summer Exchange deadline = February 1 prior to the summer term of the intended exchange.
- Fall Exchange deadline = March 1 prior to the fall semester of the intended exchange.

If a fully executed renewal agreement is not received by the above deadlines, students (from either institution) may not participate in that exchange. This means their application will not be processed until the agreement is executed.

Phase II: DRAFTING, EVALUATING, & APPROVING THE INTERNATIONAL AGREEMENT

Step 4: Determine & Draft the Appropriate Type of Agreement

Your College International Agreement Representative, IPC member, and/or PPO will help you decide what type of agreement is appropriate based on the program goals. At this time, schedule to meet with your College International Agreement Representative, IPC, or PPO (globalsupport@tamu.edu), if you have not already done so, discuss specific interests for collaboration with the approved foreign partner. To simplify the international agreement process, the Texas A&M Public Partnership & Outreach office has developed a series of templates and supplemental resources to assist in developing a specific agreement. In order to reduce processing and review time, please use approved templates whenever possible. To view the available agreement templates, including the Justification Statement, click *forms* on globalsupport.tamu.edu or <http://globalsupport.tamu.edu/Global-Partnerships/International-Agreements>. To find the list of College Representatives, visit, <http://globalsupport.tamu.edu/Global-Partnerships/External-Links/College-Representatives>.

A. Memorandum of Understanding (MOU): A Memorandum of Understanding (MOU) is a general agreement that lists areas of possible joint activities, without creating financial obligations or committing resources. This type of agreement can also serve as a “letter of intent”, sometimes requested by foreign partners. While this template establishes a formal relationship between TAMU and the institution abroad, it does not authorize specific actions. The purpose of an MOU is to acknowledge a formal, ongoing, strategic, long-term relationship between institutions. An MOU does not express a binding commitment to any specific activity, but rather a serious intention to explore. MOU’s are not encouraged unless there is clear intent to implement an actual project of exchange and/or other academic activities in the near future, where the execution of the MOU will foster that action. The MOU establishes a framework for exploring collaboration, and it identifies institutional concerns such as consistency with accreditation principles, compliance with immigration and export control requirements, as well as intellectual property ownership. These agreements are not usually renewed and are expected to be replaced by specific agreements. However, the agreement initiator may request a renewal of an exploratory agreement providing rationale for a continued collaboration with the partner university.

B. Memorandum of Agreement/MOA: The Memorandum of Agreement (MOA) is a specific agreement involving financial arrangements, institutional obligations, or specifies the terms of academic programs. MOAs are used to establish such elements as collaborative degree programs, reciprocal exchange programs, joint research centers, or research projects where funds or other resources are committed. There are several established types, some of which have templates; for all others, PPO can provide recently approved samples.

The agreement types described below do not cover all possible collaborations, however, they provide a good starting point. At the meeting with the college representative/PPO, the current template samples can be reviewed and a determination made as to which template to use. PPO can work with the College International Agreement Representative to develop a draft document that applies to the specific collaboration. In addition, PPO can draw language from other approved agreements that may fit programmatic needs and to expedite the review process.

- 1. General Collaboration Agreement/MOA:** Used as a way of formalizing cooperation without defining how, this type of agreement does not outline specific programming but shows clear intent of collaboration. This general MOA does not vary from the general MOA template and may be finalized quickly.

- 2. Reciprocal Student Exchange Agreement (REEP):** This agreement establishes the parties' roles and responsibilities, program requirements and terms and conditions pertaining to the implementation of reciprocal student exchanges between TAMU and an institution abroad. REEP activities have financial, accreditation, and immigration implications and require a thorough evaluation. The implementation of a reciprocal student exchange requires a balance of the course credit count of incoming and outgoing students. Per SACSCOC policies, an exchange may not begin until a fully executed agreement exists and SACSCOC has been notified by the Office of the Provost. Before a REEP agreement may be approved, the program must meet following policies and procedures:
 - TAC Chapter 21, Subchapter AA, 21.901-21.910
 - [University SAP 13.04.99.M1.01, Student Travel Procedures](#)
 - [University SAP 21.01.03.M0.02, Foreign Travel](#)
 - [University SAP 26.99.01.M0.01, International Student Health Insurance](#)
 - [SACSCOC Policy on Substantive Change](#)

- 3. Dual Degree Program MOA:** The SACSCOC Policy Statement on Joint & Dual Academic Awards defines a dual educational program as "one whereby students study at two or more institutions and each institution awards a separate program completion credential bearing only its own name, seal and signature." These arrangements require in-depth evaluation by the appropriate administrators in Curricular Services and the Provost's Office. Before a dual educational international program agreement may be approved, the program must meet the criteria listed for REEP Agreements (above).

4. **Joint Degree Program MOA:** The SACSCOC Policy Statement on Joint & Dual Academic Awards defines a joint educational program as “one whereby students study at two or more institutions and the institutions grant a single academic award bearing the names, seals, and signatures of each of the participating institutions.” Currently, Texas A&M University does not support the development of Joint Degree Programs.
5. **Technical and Scientific Cooperation Agreement/Research Agreement:** This type of agreement provides a general framework for collaboration on academic research, addresses intellectual property ownership, and provides for compliance with applicable laws. These agreements ARE NOT appropriate for relationships that involve sponsored research projects, activities associated with restricted technologies, or activities that are expected to lead to the development of commercial intellectual property, such as licenses and patents. See the Office of Sponsored Research (<https://vpr.tamu.edu/>) for more information about these types of agreements.

Step 5: General International Agreement Drafting Considerations

A. Compliance: Please note, all international agreements between Texas A&M and foreign partners are governed by a combination of Federal law, Texas State law, Texas Higher Education Coordinating Board Rules, Southern Association of Colleges & Schools Commission on Colleges (SACSCOC), Texas A&M University policies and, where appropriate, Export Control laws. The most up to date templates address these issues but changes are inevitable and unpredictable.

PPO coordinates with various units on campus to ensure all rules and regulations are satisfied. Some of which include, but are not limited to:

- International Faculty & Scholar Services, Dean of Faculties, <http://ifss.tamu.edu/aboutus>
- International Student Services, <http://iss.tamu.edu/>
- Office of Vice President for Research & Graduate Studies, <http://vpr.tamu.edu/>
- Study Abroad Office, <http://studyabroad.tamu.edu/Program-Types>
- Contract Administration, Division of Finance & Administration, <http://contracts.tamu.edu/>
- Curricular Services, Office of the Registrar, <http://curricularservices.tamu.edu/>

B. General Agreement Language:

- **Formal References:** Formal, legal names of the institutions should be listed; avoid acronyms on the title.
- **Purpose Statement:** Each agreement should establish the objective of the relationship.
- **Program Director/Liaison:** Individuals responsible for communicating and coordinating the relationship and program details.
- **Termination Statement:** States the length of time required to notify the other party about termination of the agreement, typically no more than six months.
- **Modification Statement:** Indicates if the agreement can be amended or renewed.

- Marketing/Logo Authorization: Grants permission for the partners to use their respective logos and names to promote the agreement.
- Dispute Resolution: Stipulates the preferred means of resolving a dispute when there are specific deliverables outlined.
- Date and Duration of Agreement: Execution and expiration dates for effective tracking and maintenance of agreements are critical. The duration of the agreement is typically up to 5 years. Signatories should therefore sign and date all duplicate copies of the agreement.
- Signatories: Authorized signatories, including names and titles, should be clearly identified. All agreements must be signed by authorized representatives of both institutions/organizations to become fully “executed.”

C. Translation Proofing: Document proofing is required before any University officials sign an agreement in a language other than English. PPO provides translation proofing when a partner requests an official, signed translation of the agreement in their language. PPO utilizes a third party translation firm to ensure both the English and the translated documents have the same legal meaning. The partner is responsible for providing an initial translated document for vetting. Contact PPO for assistance with the translation proofing process.

D. Timeline: The timelines for the international agreement processing varies. We strongly encourage utilization of the pre-existing international agreement templates to help expedite the process.

As mentioned above, in some cases international agreements will need to be routed through other TAMU offices for review. Thus, agreement creators should be aware that the approval and routing ***process can take from three to eight weeks when templates are used*** and therefore are encouraged to begin the process early. Dual Degree programs or other academic programs with substantive curricular changes or considerations, can take up to a year.

Step 6: Routing for Approval & Signatures

Once the draft of the agreement is finalized, PPO will route for all appropriate signatures, including foreign partner signatures. All international agreements at Texas A&M must comply with President’s Delegation of Authority for Contract Administration (<https://contracts.tamu.edu/media/1600736/contract-delegation-authority.pdf>) which provides information about who can sign various types of agreements or contracts depending on the anticipated dollar amount for the contract. The individual identified within the delegation is the only Texas A&M University signatory ***required*** for the agreement or contract. However, Colleges/Departments may want, or be required by their college/division, to add additional signatories.

Should your dean forgo signing the agreement, provide PPO documentation from the college/ department/ unit leadership showing support of the potential partnership agreement or renewal.

All international agreements must be signed by the Vice Provost & Chief International Officer to be legally binding. The Dean and other representatives of the respective College, department or unit may

also sign agreements. The Justification Statement described in earlier steps must be part of the package routed for the Vice Provost's signature.

Step 7: Record the International Agreement

After all of the agreement is signed by all appropriate signatories, PPO will make copies of the agreement and distribute them accordingly. PPO will also file the official international agreement in the online institutional international agreement database, Move On, and include all appropriate documentation. We encourage the individual college to keep a comprehensive record of the international agreement, as well.

PPO can provide reports on all international agreements in the process to make sure agreement drafts are advancing within a reasonable time frame. PPO will also rely on the faculty initiator and/or college representative (<http://globalsupport.tamu.edu/Global-Partnerships/External-Links/College-Representatives>) to ensure a final agreement is delivered within a reasonable time frame for the client.

- PPO will be responsible for maintaining the institutional international agreement database, and for keeping all clients educated on the system.
- At any given time, a faculty or staff member may check the international agreement database to check the status of their agreement.

Phase III: ASSESS THE PARTNERSHIP

Step 8: Assess the Partnership – Review & Renew

A. Evaluating the international partnership:

1. Colleges evaluate success of active International Agreements.
2. College international agreements representative and/or agreement initiator receive a notification of renewal via email from the PPO Office in accordance to the mid-term schedule prepared upon the international agreement's finalization.
3. The faculty initiator and/or college Dean are responsible for keeping up with all agreement deadlines including, but not limited to assessments and the expiration of the general agreement.

B. Renewal prior to Expiration: To renew an agreement at the end of its term, the faculty initiator must submit a new justification statement. Any changes or new developments in the collaboration must be noted. The process for renewal follows the same procedure as that for establishing a new agreement.

C. Renewal deadlines: Step 3 in Phase 1 for Reciprocal Education Exchange Agreement (REEP) deadline for renewal schedule.

D. Renewal Desired but Not Possible prior to Expiration: The University will not carry on activities under an expired agreement unless an extension of the expiring agreement is approved prior to expiration. While it is unusual to require an extension, Public Partnership and Outreach (PPO)

can request an extension on your behalf. To obtain such an extension, you will need to provide the following information to PPO at globalsupport@tamu.edu:

4. The college(s) or department(s) requesting the extension.
5. The name of the partner institution and pending date of expiration.
6. The extension date requested (please allow 2 – 3 weeks processing time from the date of request).
7. Statement of why a new agreement cannot be finalized within the existing timeframe.

For more information please contact globalsupport@tamu.edu