

## Procedures for establishing new Exchange Agreements

Exchange agreements with partner academic institutions can provide valuable opportunities for Carnegie Mellon students and faculty to enhance the educational experience. For the purpose of this document, we are focused on bi-directional student exchange agreements. Departments or programs considering entering into an exchange agreement should weigh a number of factors, including the ability to maintain a balanced exchange of students between the two institutions.

**Step 1: *Complete the New Academic Program Process (NAPP) Step 1 Academic Consultation Phase Checklist and Complete New Exchange Program Checklist (see reverse), obtain signature of Department Head & Dean, indicating their approval for this new agreement.***

**Step 2: *Schedule a meeting with Office of International Education (OIE) staff (Assistant Director and/or Director) to review the Step 1 forms.*** Chris and/or Linda will help guide you through the exchange process, issues to consider, and best practices to ensure a successful exchange agreement.

**Step 3: *Create a draft exchange agreement with partner university using the current Carnegie Mellon template “Memorandum of Understanding (MOU)”***, filling in all relevant details about your program/agreement, then forward the draft MOU to your partner institution for their updates.

**Step 4: *Return completed draft MOU, with updates from partner institution, to OIE Assistant Director*** for review by OIE, the Office of General Counsel (OGC) and the Vice Provost for International Programs and Strategy (VPIPS). Incorporate comments or update, if necessary, and send to partner institution for approval and final review. Repeat step 4 as necessary, until both institutions agree on a final version of the MOU.

**Step 5: *Obtain two signed final versions of the MOU from partner institution*** (two signed versions are necessary, as both the partner institution and Carnegie Mellon will need fully-executed agreements). Submit both signed versions of the MOU to the OIE Assistant Director who will forward to VPIPS for final signature of the Provost.

**Step 6: *Upon receiving the fully signed MOU, forward a it to your partner institution, retaining a copy for your records.*** OIE maintains one fully executed original of the MOU for Carnegie Mellon’s files.

**Step 7: *Complete the remaining NAPP forms and submit electronically, with a cc to OIE, to Enrollment Services.*** Include a copy of the MOU.

**Step 8: *While NAPP process is pending, work with OIE Assistant Director to review the communication and current processes necessary for issuing visa documents.***

**Step 9: *Create an admissions review process for incoming and outgoing students.*** Prepare an acceptance letter for both incoming and outgoing students. Begin working with CMU students and partner institution to select/admit exchange students.

## New Exchange Program Checklist

The establishment of student exchange programs provides important opportunities for students to engage in learning across borders and to internationalize the curriculum. There are a number of factors to consider when entering into a (new) partnership with another institution. Prior to completing this checklist, please read "Considerations for Establishing New Student Exchange Agreements".

CMU College: \_\_\_\_\_ Department: \_\_\_\_\_

Exchange Institution/Department: \_\_\_\_\_ Proposed Start: \_\_\_\_\_

CMU Departmental contact completing this form: \_\_\_\_\_ Date: \_\_\_\_\_

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Articulate the background and rationale for the proposed exchange. Attach additional information, if necessary.

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\_\_\_\_\_  
\_\_\_\_\_

How many students, per institution, will this agreement cover each year? \_\_\_\_\_  
(2 to 4 semester spaces is the norm for most exchange agreements).

Do you anticipate that there will be a relative balance between the numbers of outgoing and incoming students participating on this exchange? If relative balance is anticipated, check here: \_\_\_\_\_.

If relative balance is not anticipated, explain why the department seeks to enter into an exchange that will be imbalanced: \_\_\_\_\_

\_\_\_\_\_

Does the academic calendar of the partner institution align with Carnegie Mellon's academic calendar?  
\_\_\_\_\_ Yes \_\_\_\_\_ No If no, which semester (fall or spring) would you anticipate Carnegie Mellon students being able to participate in the program abroad? \_\_\_\_\_

What is the language of instruction for the majority of undergraduate courses which will be available for enrollment by Carnegie Mellon students? \_\_\_\_\_

If not English, do you anticipate that students in your department will have the language proficiency sufficient to both participate in this exchange and be academically successful? \_\_\_\_\_

\* If different than above, indicate the faculty member/administrator who will work with OIE to *guide the exchange agreement process from initial review to implementation*: \_\_\_\_\_

\*If different than above, indicate the faculty member/administrator *who will manage ongoing exchange procedures*, including: promotion, application process for outgoing students, communication with partner university and coordinating with OIE for immigration documents for incoming students (may be more than one person): \_\_\_\_\_

\_\_\_\_\_

CMU Faculty Sponsor name: \_\_\_\_\_ OIE: \_\_\_\_\_

Signature & date: \_\_\_\_\_ Signature & date: \_\_\_\_\_