

**Business Evaluation Form: PERIODIC COLLABORATIVE REVIEW OF UK SCHOOL-BASED COLLABORATIVE PROVISION**

* Please complete this form when an existing **School-based Collaborative** agreement is due to expire and is being reviewed with the intention of renewing the agreement.
* **Guidance** to assist with the completion of this form and the processes to be followed can be found on this [link](https://myntuac.sharepoint.com/%3Aw%3A/r/sites/CollaborationsAndPartnerships/Shared%20Documents/03.%20Business%20Evaluation%20Guidance%20UK%20SBCP%20Review.docx?d=wcb566f8eff994d8e8793865eaad00bcb&csf=1&web=1&e=nsfW4p).
* It is important to ensure that **triage** discussions have taken place prior to completing the form. Please contact the Collaborations and Partnerships Team Leader in CADQ.

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| **Date form last updated:** |  |
|  |
| **TRIAGE** |
| **Triage completed:**  | [ ]  Yes [ ]  No | **Date of discussion:** |  |
| **Members involved:** |  |

**PART A - TO BE COMPLETED BY THE SCHOOL**

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| **OVERVIEW OF REVIEW** |
| **School** |  |
| **Lead contact in the School** (for this purpose) |  |
| **Partner name** |  |
| **Lead contact at the Partner** (for this purpose) |  |
| **Category of collaboration** | [ ]  Franchise [ ]  Joint delivery [ ]  Joint/double degree[ ]  Sub-contracted apprenticeship | [ ]  Dual degree[ ]  Joint/double MPhil/PhD[ ]  Other (please state): |
| **Delivery model** |  |
| **Current period of institutional approval:**  | **Date from:** |  | **Date to:** |  |
| **Review(s) required:** | **Institutional review:** [ ]  Yes [ ]  No**Course review:** [ ]  Yes [ ]  No If yes, please provide details of courses below. |
| **Course:** | **School:** | **Approval period:** |
|  |  |  |
| **Proposed date for review:** |  |
| **REVIEW DETAILS** |
| **Recruitment in previous 3 years** | **Course (and site if appropriate):** | **Enrolments:****Year 20\_\_/20\_\_** | **Enrolments:****Year 20\_\_/20\_\_** | **Enrolments:****Year 20\_\_/20\_\_** |
| Predicted | Actual | Predicted | Actual | Predicted | Actual |
|  |  |  |  |  |  |  |
| **Forecast student numbers for next 3 years** | **Course (and site if appropriate):** | **Enrolments:****Year 20\_\_/20\_\_** | **Enrolments:****Year 20\_\_/20\_\_** | **Enrolments:****Year 20\_\_/20\_\_** |
| Predicted | Actual | Predicted | Actual | Predicted | Actual |
|  |  |  |  |  |  |  |
| **If you are forecasting an increase or decrease in student numbers of 20% or more than the average for the previous three years, please provide a rationale.** |  |
| **Challenges experienced during the period of this agreement:** *Tick all that apply* | Marketing Recruitment Admissions Registration/enrolment Examination boards Providing student results/marks/transcripts Award Ceremonies Communication Staffing resource Travel Estates Specialist equipment IT provision Library provision | [ ]  Yes [ ]  No[ ]  Yes [ ]  No[ ]  Yes [ ]  No[ ]  Yes [ ]  No[ ]  Yes [ ]  No[ ]  Yes [ ]  No[ ]  Yes [ ]  No[ ]  Yes [ ]  No[ ]  Yes [ ]  No[ ]  Yes [ ]  No[ ]  Yes [ ]  No[ ]  Yes [ ]  No[ ]  Yes [ ]  No |
| If yes, please give details explaining the impact of the issues and providing a brief summary of how these issues can be overcome. |
| **STRATEGIC FIT** |
| **Does the School support the continuation of this collaboration in principle?** |  |
| **Please provide a rationale for the continued strategic importance of this partnership to the University.** |  |
| **Please provide a summary of the continued benefits of this collaboration for recruitment, student learning opportunities, research, and internationalisation.** |  |
| **RESOURCES** |
| **Has there been any impact on resources as a result of this collaboration?** |  |
| **Is the School able to continue to resource the collaboration?** |  |
| **Are there any potential resource implications/additional costs for the School and/or Professional Services as a result of continuing this collaboration?** |  |

**PART B – TO BE COMPLETED BY THE FINANCE AND PLANNING MANAGER**

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| **FINANCE APPRAISAL** |
| **How has this provision performed in terms of the original projected income and expenditure against the actual income and expenditure?** |  |
| **Challenges experienced during the period of this agreement** | Are there any outstanding invoices, a history of late payments or unresolved issues with fee payment? | [ ]  Yes [ ]  No |
| Has there been a change of ownership or leadership at the Partner since the last review? |  [ ]  Yes [ ]  No |
| Has there been any change of status of the partner since the last review/validation? |  [ ]  Yes [ ]  No |
| If yes, please give details: |
| **Due diligence** | Is due diligence required? [ ]  Yes [ ]  NoIf no, please state why not:If due diligence has been carried out, please provide a summary of key findings: |
| **Financial evaluation**  | Is financial evaluation required? [ ]  Yes [ ]  NoIf no, please state why not:If financial evaluation has been carried out, please provide a summary of key findings: |
| **Have financial negotiations for the new contract period been discussed and completed with the Partner?** | [ ]  Yes [ ]  NoIf yes, what are the agreed charges?If no, what is the current status of the negotiations? |
| **Additional comments**(if required) |  |

**PART C - BUSINESS APPROVAL REQUIRED**

* This proposal should now be considered by the **School and UKBEG***.*
* This approval process can take place simultaneously.
* The **UK Partner Assessment Form** should also be reviewed when considering this proposal.

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|  | **School Executive Team** | **UK Business Evaluation Group** |
| [ ]  Approve [ ]  Reject [ ]  Changes Proposed | [ ]  Approve [ ]  Reject [ ]  Changes Proposed |
| **Name:** |  |  |
| **Job title:** |  |  |
| **Signature:** |  |  |
| **Date:** |  |  |
| **Comments:** |  |  |

**PART D - ACADEMIC APPROVAL REQUIRED**

* Periodic Collaborative Review can now take place**.**
* Please refer to Section 10 of the [NTU Quality Handbook](https://www.ntu.ac.uk/about-us/academic-development-and-quality/regulatory-information/quality-handbook) and contact colleagues in CADQ for further guidance and support.