

APPENDIX B

MOU Preparation: From Partner Identification to Formal Agreement

A checklist and sample to use once you have identified a prospective partner and are ready to move toward a formal framework.

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About This Sample

Most institutions have their own standard templates, and your legal office should always be your first stop. The goal of sharing a sample is not to replicate the legal document but to show what types of elements are typically included, so you can have an informed conversation with your partners and your legal team.

The small gray labels at the top right of each article [*like this*] correspond to the MOU Preparation Checklist categories. Use them to trace how your preparatory work maps to each section.

SAMPLE DOCUMENT — FOR REFERENCE AND WORKSHOP USE ONLY

This document does not represent an actual MOU, institutional agreement, or legal template. It was created for educational purposes only to illustrate the types of elements commonly found in international partnership agreements. It does not reflect the policies, commitments, or legal positions of any specific institution. Any use for actual partnership development must involve review by your institution's legal office.

MOU Preparation Checklist

Complete this before beginning MOU drafting. Categories correspond to the labeled sections in the sample MOU below.

PROGRAM TYPE AND SCOPE

- ☐ What type of exchange are you building? (check all that apply)
 - ☐ Professional / faculty exchange
 - ☐ Virtual exchange — lighter lift (e.g., deliberative dialogue, structured peer discussion)



This is a program of the U.S. Department of State with funding provided by the U.S. Government, administered by World Learning.



- Virtual exchange — more intensive (e.g., COIL, co-taught course)
 - Short-term study abroad (typically 1–4 weeks)
 - Semester-length or extended student exchange
 - Articulation / partial credential completion
- ☐ Is this a phased model starting with one type and building toward others?
- ☐ What is the intended duration of the overall partnership agreement?

VIRTUAL EXCHANGE — IF APPLICABLE

- ☐ Have faculty coordinators been identified on both sides?
- ☐ Is there sufficient time zone overlap for synchronous sessions?
- ☐ Has a shared technology platform been agreed on that works for both institutions? *(CCID members: ask CCID about discounted access through their vetted provider.)*
- ☐ How will student participation be recognized at each institution?
- ☐ What is the planned format and frequency of virtual sessions?
- ☐ Is there a platform cost, and which institution covers it?

SHORT-TERM STUDY ABROAD — IF APPLICABLE

- ☐ What is the cohort size and program duration?
- ☐ What does the host institution provide — and is this documented in an agreed itinerary? *Only items on the agreed itinerary are covered by any fee waiver.*
- ☐ What health, safety, and emergency infrastructure exists at the host site?
- ☐ What visa or entry requirements apply for traveling students?
- ☐ What travel insurance is required, and who is responsible for it?
- ☐ What is the full per-student cost, and what is vs. is not covered?
- ☐ Has a site visit or equivalent assessment occurred before student travel?

SEMESTER-LENGTH OR EXTENDED EXCHANGE — IF APPLICABLE

- ☐ What is the enrollment term and credit hour expectation for inbound students?
- ☐ What are the language proficiency requirements at each institution?
- ☐ What visa status is required, and who manages immigration documentation?
(U.S. institutions: DSO must issue appropriate documentation.)
- ☐ What housing options exist for inbound students?
- ☐ Is health insurance required, and does your institution have a minimum coverage standard?

- ☐ How will coursework at the partner institution transfer to the home institution?

LEGAL AND INSTITUTIONAL APPROVALS

- ☐ Does your institution have a standard MOU template? Start there.
- ☐ Who must approve the agreement, and what is the expected timeline?
- ☐ Does the partner country have laws governing foreign academic partnerships?
- ☐ What data privacy laws apply in the partner country?
(U.S. institutions: review FERPA implications for international student record sharing.)
- ☐ Does the partner institution require legal review on their end?

FINANCIAL TERMS

- ☐ What financial commitments is your institution authorized to make?
- ☐ Who has authority to approve any tuition or program fee waivers?
- ☐ Is the financial structure reciprocal?
- ☐ What happens if a program cycle is cancelled or cohort falls below minimum size?
- ☐ Are there external funding sources that could support the partnership?
(U.S. institutions: Fulbright, Title VI, State Dept. exchange grants, NSF PIRE, private foundations)

RELATIONSHIP INFRASTRUCTURE

- ☐ Is there a named coordinator at each institution with clear accountability?
- ☐ What is the communication plan — frequency, channel, who initiates?
- ☐ Where will partnership documents and history be stored for continuity?
- ☐ Is there at least one existing conference or travel opportunity for an annual touchpoint?
- ☐ Is there an annual review built into the agreement?

Sample MOU

The small labels at the top right of each article correspond to the checklist categories above.

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MEMORANDUM OF UNDERSTANDING

Virtual Student Exchange and Short-Term Reciprocal Study Abroad Program

Between Institution A and Institution B

[Partnership Scope]

Preamble

This Memorandum of Understanding ("MOU") is entered into between Institution A, located in [City, State, Country], and Institution B, located in [City, Country] (collectively, "the Parties").

This MOU reflects the mutual interest of both institutions in fostering academic collaboration, cross-cultural learning, and student success through a phased two-year model: beginning with faculty relationship-building and professional exchange, advancing to a faculty-coordinated virtual student exchange, and culminating in short-term reciprocal student mobility.

[Partnership Scope]

Article 1 — Purpose and Scope

1.1 Purpose. This MOU establishes a framework for academic cooperation between Institution A and Institution B, with a focus on three sequenced activities: (1) faculty relationship-building and professional exchange; (2) a faculty-coordinated virtual student exchange; and (3) a short-term reciprocal student study abroad program.

1.2 Non-Binding. This MOU is not legally binding and does not create financial obligations unless a separate implementing agreement is executed. Either party may withdraw with thirty (30) days written notice.

1.3 Non-Exclusive. Both institutions retain the right to enter into similar agreements with other institutions.

[Partnership Scope]

Article 2 — Two-Year Program Timeline

The Parties agree to implement activities according to the following phased timeline. Specific dates shall be confirmed by institutional coordinators and documented in annual Program Addenda.

Period	Institution A	Institution B	Joint Activity
Year 1 Fall	Identify faculty coordinator(s); align on partnership goals	Identify faculty coordinator(s); align on partnership goals	Site visit or virtual meeting; professional exchange; relationship building
Year 1 Spring	Faculty co-design virtual exchange curriculum; student recruitment begins	Faculty co-design virtual exchange curriculum; student recruitment begins	Joint planning sessions; finalize virtual exchange structure and platform
Year 2 Fall	Virtual exchange launches — Institution A students participate	Virtual exchange launches — Institution B students participate	Faculty-coordinated virtual sessions; ongoing student engagement
Year 2 Spring	Orient and support 2 inbound students from Institution B	Send 2 students to Institution A (8-week session, 12 credit hours)	Advising, orientation, and program support for inbound students
Year 2 Summer	Send 15–20 students to Institution B for 12-day program	Host cohort from Institution A; deliver program per agreed itinerary	12-day program delivery; evaluation and debrief

2.1 Year 1. Both institutions will identify and confirm faculty coordinators, conduct reciprocal professional exchange (aligned where possible with existing travel or conference opportunities), and co-design the virtual exchange curriculum. No student exchange occurs in Year 1.

2.2 Year 2. The Parties will launch the virtual exchange in the Fall term, host the inbound student exchange in the Spring term, and conduct the outbound study abroad in the Summer term.

Article 3 — Faculty-Coordinated Virtual Student Exchange

3.1 Structure. The Parties agree to establish a faculty-coordinated virtual exchange connecting students at Institution A with students at Institution B. This is a faculty-led collaborative learning model, distinct from a formal COIL course designation, designed as a flexible model of virtual engagement coordinated at the faculty level without requiring formal cross-enrollment.

3.2 Program Activities. Faculty coordinators will co-design shared learning activities, which may include joint synchronous discussions, asynchronous collaborative projects, peer feedback exchanges, guest presentations, or cultural programming. Each institution determines how student participation is recognized within its own curriculum.

3.3 Technology Platform. Both institutions agree to identify a shared platform accessible and reliable for all participants, taking into account institutional systems, country-level access considerations, cost, and student access requirements. Platform selection shall be confirmed in the Program Addendum at least ninety (90) days before the launch of virtual exchange activities.

3.4 Faculty Coordination. Each institution designates one or more faculty coordinators. Coordinators will meet no less than [X] times during Year 1 to complete co-design before the Year 2 Fall launch.

3.5 Faculty Costs. Each institution is responsible for its own faculty coordinator support. Neither institution assumes financial responsibility for the other's faculty costs.

Article 4 — Inbound Students: Institution B at Institution A

4.1 Cohort. Institution B agrees to send two (2) students to Institution A per exchange cycle for one Spring term.

4.2 Enrollment. Inbound students will enroll in an eight (8) week Spring session, completing four (4) courses for twelve (12) credit hours.

4.3 Tuition Waiver. Institution A waives standard international student tuition for up to two (2) inbound students per cycle, covering tuition for twelve (12) to fifteen (15) credit hours and standard mandatory institutional fees.

4.4 Waiver Exclusions. The waiver does not cover housing, health insurance, books, materials, technology fees, transportation, personal expenses, or any optional programming outside standard course enrollment.

4.5 Enrollment Conditions. Inbound students must meet Institution A's admissions requirements including language proficiency and must obtain appropriate visa status prior to enrollment. The waiver requires maintaining full-time enrollment through the end of the term.

4.6 Immigration. Institution A's Designated School Official (DSO) will issue appropriate immigration documentation for confirmed students. (*U.S. institutions*)

[*Student Logistics* | *Financial Terms*]

Article 5 — Outbound Study Abroad: Institution A at Institution B

5.1 Cohort. Institution A anticipates sending fifteen (15) to twenty (20) students to Institution B for a twelve (12) day summer program.

5.2 Program Content. Institution B will work with Institution A to deliver program content including academic instruction, cultural programming, and site-based learning. Academic credit will be determined by Institution A per its own policies.

5.3 Program Fee Waiver. Institution B waives program fees for up to fifteen (15) Institution A students for the twelve (12) day summer program. The waiver covers tuition and academic instruction fees, housing in standard program accommodations, meals in the standard package, and local transportation between the campus and itinerary activities.

5.4 Waiver Exclusions. The waiver does not cover international airfare, travel insurance, personal expenses, passport or visa fees, or any activities not listed in the confirmed Program Addendum — regardless of whether they are organized by Institution B staff.

5.5 Itinerary Agreement. All waiver-covered activities shall be documented in a Program Addendum executed by both coordinators at least ninety (90) days before the program start date.

5.6 Cohort Threshold. The waiver applies to a minimum of [X] and maximum of fifteen (15) students. If the minimum is not met, the Parties will negotiate in good faith.

5.7 Reciprocity. The program fee waiver (Article 5.3) and the tuition waiver (Article 4.3) are reciprocal commitments. If either party cannot fulfill its waiver for a given cycle, it will notify the other at least one hundred twenty (120) days before the program start date.

[Relationship Infrastructure]

Article 6 — Coordination and Review

6.1 Coordinators. Each institution designates a primary coordinator responsible for communications and implementation. Coordinators communicate no less than once per term during active programming.

Institution	Coordinator	Title	Contact
Institution A	[Name]	[Title]	[Email]
Institution B	[Name]	[Title]	[Email]

6.2 Conference Touchpoints. The Parties are encouraged to utilize existing professional conference attendance — such as the CCID Annual Conference and the NAFSA Annual Conference — as annual relationship maintenance touchpoints, in addition to any dedicated site visits.

6.3 Annual Review. The Parties will conduct an annual review to assess program outcomes and address any concerns.

[Legal & Approvals]

Article 7 — Confidentiality, Privacy, and Intellectual Property

7.1 Each institution retains ownership of its own intellectual property. Nothing in this MOU transfers ownership from one institution to the other.

7.2 Neither institution shall use the other's name, logo, or marks in any public communication without prior written approval.

7.3 The Parties will handle any student educational records shared under this MOU in compliance with applicable privacy laws in both countries.

[Legal & Approvals]

Article 8 — Term and Termination

8.1 Term. This MOU is effective upon the date of last signature and remains in effect for three (3) years unless renewed or terminated.

8.2 Termination. Either party may terminate with thirty (30) days written notice. Termination does not affect implementing agreements already in effect for a current cohort.

8.3 Renewal. The Parties may renew by mutual written agreement prior to expiration.

[Legal & Approvals]

Article 9 — General Provisions

9.1 This MOU does not constitute an employment, agency, or joint venture relationship between the institutions.

9.2 This MOU may be amended by mutual written agreement.

9.3 This MOU does not create legally binding financial obligations except as set forth in separately executed implementing agreements.

Signatures

In witness whereof, the authorized representatives of the Parties have signed this Memorandum of Understanding.

INSTITUTION A

Signature

Name: _____

Title: _____

Date: _____

Signature

Name: _____

Title: _____

Date: _____



INSTITUTION B

Signature _____

Name: _____

Title: _____

Date: _____

Signature _____

Name: _____

Title: _____

Date: _____

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Authorship & Attribution

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