

Statement and Procedures on Principles for Institutional Partnerships

The University of Waterloo engages in many partnerships across Canada and the world in support of its mission of teaching, research, and learning. This statement, and accompanying procedures, outlines a set of unified principles and processes for units managing partnerships. A university-wide approach will allow us to consistently and transparently enter, renew, and review such engagements.

Only a subset of the University of Waterloo's partnerships are "*institutional*" in scope. Generally speaking, institutional partners include institution-to-institution partnerships or institution-to-donor relationships (e.g. for research or student mobility, gifts and donations, and sponsored research agreements), but not procurement decisions or individual work-integrated learning experiences such as co-op terms or internships. Collaborations initiated by a researcher with external investigators to conduct investigator-driven research – even when requiring institutional signatures – are not considered institutional partnerships under these guidelines. Similarly, externally hosted student placements, practica, and internships are also outside of this framework.

The University of Waterloo has the overarching objective of "the pursuit of learning through scholarship teaching and research within a spirit of free enquiry and expression," further refined through the Values of the institution (that we "think differently," "act with purpose," and "work together"). The institution's mission and values shall normally be at the core of all activities at the University, including the engagements that the University has beyond its gates.

Principles

The following principles inform the University of Waterloo's institutional partnerships. All such institutional partnership activities must:

1. Align with the University of Waterloo's mission, vision, and values
2. Respect institutional autonomy and academic freedom
3. Prioritize safety and security of Waterloo community members
4. Adhere to international human rights standards, as codified in international legal instruments and guidelines [adopted by the Government of Canada](#) or the Government of Ontario
5. Embed reciprocity, respect, mutual benefit, and cultural sensitivity
6. Comply with law, regulation, and policy

7. Respect Waterloo's approach to intellectual property
8. Support environmental responsibility in partnership activities
9. Uphold the University's commitment to reconciliation and decolonization when initiating institutional partnerships

Procedures for Institutional Partnerships

The Executive Council member responsible for the institutional partnership must ensure that the principles are at the core of any decision to enter or renew the partnership. All requests to enter or renew an institutional partnership must document how the partnership activities align with each of the nine principles above.

On an annual basis, a summary report on institutional partnerships will be submitted by the President to the Board of Governors and Senate for information. This will include all partnerships except Gifts, which are reported as per Policy 7 (Gift Acceptance).

Assessment of Concerns Regarding Institutional Partnerships

Concerns from members of the community about a partnership should be brought to the attention of the Executive Council member responsible for the partnership. If the concerns are not resolved at that level, they should be brought to the attention of the Office of the President.

The President and responsible Vice-President(s) will work to resolve the concerns with the members of the community.

In exceptional, acute situations with documented and credible allegations that the partnership is not in alignment with the institutional partnership principles, the President, in consultation with the Board Chair, will strike an ad hoc working group to evaluate the allegation in order to determine whether the partnership should be reviewed.

The ad hoc working group will be composed of members of the community and include individuals with expertise in human rights, social justice, and the development and maintenance of academic partnerships. The majority of members of the ad hoc working group will be drawn from the Board of Governors, and elected members of Senate.

The President will report to the community, through the Senate and Board of Governors, the findings of the ad hoc working group and present an administrative response outlining the actions taken with respect to the partnership.

Appendix A: List of Relevant Policies

- 7 ([Gift Acceptance](#))
- 8 ([Freedom of Speech](#))
- 10 ([Naming Opportunities](#))
- 11 ([University Risk Management](#))
- 13 ([Signing Authority and Approval](#))
- 33 ([Ethical Behaviour](#))
- 34 ([Health, Safety, and Environment](#))
- 53 ([Environmental Sustainability](#))
- 58 ([Accessibility](#))
- 69 ([Conflict of Interest](#))
- 73 ([Intellectual Property](#))