

## Guidelines for Agreements (MOUs, MOAs, Other) – Monetary



This document outlines Guidelines for Monetary Agreements (MOUs, MOAs, Affiliation Agreements, other) for the College of Agriculture, Urban Sustainability, and Environmental Sciences (CAUSES). You are advised to follow procedures as outlined below to avoid delays or confusion. Diane Hyman is the Grants and Agreements liaison for CAUSES, responsible for working directly with the Office of Sponsored Programs (OSP) and the Office of General Counsel (OGC) to ensure full execution of documents. All questions or concerns about the process should be referred to Ms. Hyman at [dhyman@udc.edu](mailto:dhyman@udc.edu) or 274-7137.



*All agreements must be reviewed by the Office of General Counsel prior to submission for the President's approval/signature. To provide adequate time for proper review and approval, kindly plan to submit your MOUs/MOAs/Affiliation Agreements at least 7 – 10 business days in advance. All requests for OGC approval must be submitted as described herein.*

√ **Discuss the MOU/MOA/Agreement with your direct supervisor.** Once you have obtained approval, you may move forward.

√ **Complete an OSP Routing Form.** Fill out the routing form and secure all required signatures from CAUSES (PI, chair/director/Associate Dean, Dean). The routing form and agreement are required for submission to initiate the approval process. Please include all associated budget information in your package. Ensure that all contact information is accurate internally and for the other party to the agreement.

# Guidelines for Agreements (Continued) (MOUs, MOAs, Other) – Monetary

√ **Submit the routing form and entire package to Ms. Hyman via email at [dhyman@udc.edu](mailto:dhyman@udc.edu).** Please include two documents in your email to Ms. Hyman: 1) a signed routing form as described above and 2) the document/agreement in its entirety in MS Word format as required by the Office of General Counsel for legal review. Ms. Hyman will submit the package to OSP and work directly with OSP and OGC throughout the approval process.

Briiana Douglas, OSP, will manage the approval process for MOUs/MOAs/Other Agreements. The routing form is reviewed and if any additional information is required, the PI and/or Ms. Hyman will be notified by Ms. Douglas. When the routing form has been reviewed and cleared, the package moves forward for the signature of Dr. Victor McCrary, Vice President for Research, Graduate Studies/Ms. Laura-Lee Davidson, Director, OSP. Once the proper signature has been obtained in OSP, the document is forwarded to OGC for review. OGC will work with Ms. Hyman, the PI, and the other party/agency to obtain additional information, clarity or to engage in further discussion, as necessary.

Upon the OGC's review, the document will be sent to the PI to be forwarded to the other party/agency to the agreement for signature. When the signature has been secured from the other party to the agreement, the PI will forward the document to OGC to obtain the President's signature. OGC will forward a copy of the fully executed (signed by all parties) MOU/MOA/Agreement to the PI. The PI should forward a copy of the fully executed agreement to Ms. Hyman.

√ **Develop a Spending Plan.** Once the MOU/MOA/Agreement has been fully executed, a spending plan will be required. Salome Amoussou, OSP, will manage the process to complete budget set up via UDC Office of the Chief Financial Officer. Following is the link for a spending plan template: [http://files.udc.edu/docs/osp/Spending\\_Plan\\_Template.xls](http://files.udc.edu/docs/osp/Spending_Plan_Template.xls). Agreements that require interns should reflect stipends in the correct budget line within the spending plan. If you need help with developing the spending plan, please see Mr. Jose Santiago, CAUSES Budget and Grants Manager, for assistance. The completed and signed (PI's signature) spending plan should be submitted to Mr. Santiago for review. Once Mr. Santiago has cleared the spending plan for processing, it will be forwarded to OSP. In turn, OSP will work with the UDC Office of the Chief Financial Officer to complete the process. Mr. Santiago will notify the PI when an index has been set up for spending.

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*New agreements may take a minimum of six weeks to be established due to approvals required within District of Columbia Government Finance.*



**General Housekeeping:** For recordkeeping purposes, a copy of the fully executed/approved routing form and agreement will be placed on Blackboard under the CAUSES Managers organization.