RADFORD UNIVERSITY

Procurement and Contracts Process Guidance

Agreement Internal Approval Routing Form

Radford University frequently enters into memoranda of understanding and other signed agreements with both domestic and international partners.

The Office of the Provost, as well as other campus stakeholders, approves academic affiliations and memoranda of understanding to:

- Ensure agreements are following and advance the institutional mission of the university and enhance Radford's standing in the academic community
- Protect Radford University's academic reputation
- Identify institutional and geographical overlap
- Keep an accurate record of Radford's global and domestic presences
- Track agreement end dates and ensuring renewals are processed appropriately
- Minimize risks to the University, Faculty, Employees and Students

All new academic agreements or initiatives that engage with outside agencies both international and domestic, must go through an internal review and approval process *prior to review by Procurement and Contracts* to ensure compliance with university policies and confirm institutional approval and support.

If you have any questions during this process, please contact the Assistant Provost for Academic Operations at 540-831-5465.

New Agreements or initiatives meeting any one of the following criteria must be submitted for approval:

- Affiliation agreements and memoranda of understanding with institutions outside of the United States.
- Agreements that involve student, scholar, or faculty exchange.
- Agreements with for-profit educational institutions.
- Agreements with institutions outside of higher education.
- University-wide or school-wide agreements that extend beyond the individual faculty member.
- Agreements involving new joint degrees, certificates, or continuing education programs.

  - New degree and certificate programs must also comply with shared governance procedures.
- Scalable agreements to exchange information pertaining to developments in teaching, student development and research at each institution.
- Any agreement that involves an academic or financial component such as fees, credit hours, faculty privileges, etc.

Agreements that do not need to be approved via the Internal Approval Routing Form:

- Health sciences residency agreements and hospital affiliations must be sent to Procurement and Contracts for information purposes only. A routing form and university-wide approval is not required.
- Agreements being renewed that are not new initiatives

If you do not know which approval process applies, please contact Procurement and Contracts

A. Process for Approval-Department

1. Submission of the agreement for approval

- Complete *Part 1: Agreement Overview of the Agreement Internal Approval Routing Form* and submit with the draft agreement to Procurement and Contracts. The Internal Approval Routing Form must be signed by the following individuals before it is submitted:
  - Primary contact / Project Director
  - Department Chair or designee
  - Dean (signature approval by the school dean or unit director indicates that the dean or unit director endorses and approves of the agreement and any resulting financial or administrative obligations)
- Once the form is completed and signed at the department level, attach the agreement and send via email to Procurement and Contracts. Procurement and Contracts will determine what other stakeholders should be involved. Those may include but are not limited to;
  - Office of Sponsored Programs (if the agreement involves outside funding)
  - McGlothlin Center for Global Education and Engagement (if the agreement involves undergraduate student exchange)
  - Export Controls/IRB
  - Provost
  - Legal Counsel
  - Others as determined (Controller, Facilities, I.T., etc.)

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- Procurement and Contracts will route the form and the draft via DocuSign with the Provost Office being the last signature before being returned to Procurement and Contracts.
- Following the receipt of the agreement, related attachments, and the Routing Form, materials will be reviewed by the Office of the Provost, and any other necessary administrative offices.

- Departments will be contacted regarding any necessary changes to or questions about the agreement. (Substantial changes may require additional approval of the department chair, dean, director, etc.)
- Once approved by the Office of the Provost and other applicable stakeholders, the agreement, along with the routing form will be sent to the Office of Procurement and Contracts. The Office of Procurement and Contracts will work with the Office of the Attorney General to obtain legal approval if required.
- **Please allow a minimum of two weeks or more for agreement approval.**

2. Final execution of the agreement

- The final approved agreement must be signed by both a Radford University designee and a designee from the partner institution/agency.
- In accordance with Radford's Signatory Authority Policy, the Radford designee may be a Dean, Assistant or Associate Provost, Provost or Procurement and Contracts
- A copy of the fully-executed agreement must be submitted to Procurement and Contracts and the school dean or unit director.
- The Project Director is responsible for maintaining the contract file and ensuring terms of the agreement are satisfied.

3. Sub agreements, end of agreement, or agreement renewal

- Unless otherwise specified, all sub-agreements must be submitted for approval, even if an umbrella agreement exists with the same institution or agency.
- All agreements must include an end date or project duration as well as a cost projection. The project director is responsible for renewing the agreement by submitting a new routing form to Procurement and Contracts at least 90 days before the expiration of an agreement. All agreements subject to renewal must be re-submitted for approval at the end-date specified in the agreement. Otherwise, the agreement will no longer be in effect.

4. Please note:

- Failure to adhere to proper form routing procedures could result in delays in agreement processing.

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- Agreements or activities involving international visitors to Radford University may require special consideration due the United States Department of the Treasury Office of Foreign Assets Control (OFAC) requirements. Please contact McGlothlin Center for Global Education and Engagement for more information.
- Agreements in foreign languages must include an officially-translated, English version, which includes the text "English version controls." The Commonwealth of Virginia and Radford University and any affiliates are bound by the English-version of agreements only.

B. Procurement and Contracts Process

- Once form is received and signed at the department level, Procurement identifies campus stakeholders.
- Form is routed to stakeholders along with agreement via DocuSign, with Provost being the last signature before being returned to Procurement and Contracts.
- Once all stakeholder approvals are in place, follow protocol to negotiate problematic terms
- If agreement requires legal review, confer with Executive Director of Procurement and Contracts who will submit to the Attorney General's office.
- Once final draft is completed and approved, follow standard agreement/contract signature protocol.

C. FAQ

My agreement does not involve any payments. Does it still need to be approved?

There are many instances in which an agreement that does not involve payments must be approved by the Office of the Provost. This includes, for example, agreements for faculty, scholar, staff, or student exchange, university-level agreements to host regularly occurring joint conferences or events, and agreements with any for-profit institution of higher education.

My agreement involves a Procurement component (Consulting, New RFP Initiatives, etc.). How is this approved?

Contact Procurement and Contracts in advance for agreements involving a Procurement Component. These agreements are approved by submitting a PR. If the vendor is unknown due to the requirement of an RFP, the PR is entered using "Best Vendor" for the vendor and $0 for the dollar amount. Procurement and Contracts will determine the applicable routing process.

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