

Research Core Agreements

Contracts Between Core Facilities and External Customers



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2023 SYMPOSIUM
FOR RESEARCH ADMINISTRATORS

Contact Information

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Research Core Agreements

Contract
between a
UNC Core
Facility and
an external
entity

Necessary to
establish
agreed upon
SOW, rates,
and payment
terms

Core may
begin work
upon partially
executed
agreement

Office of
Sponsored
Programs is
the only
party that can
execute on
behalf of UNC

Submitting Contract to OSP

Research Core Agreements portal on OSP RCD webpage

<https://research.unc.edu/sponsored-programs/resources/research-core-development/>

Request New Template

- Receive new template or modify existing template

Submit an Agreement

- Submit partially executed agreement to OSP for full execution

Submit Update Request

- Amendments of existing agreements or changes in rates

Submit Change Request

- Negotiate UNC agreement or use client's agreement

Research Core Agreements Portal

The screenshot shows the UNC Research website. At the top left is the UNC Research logo. To the right is a search bar with the text "Search the UNC Research site..." and a magnifying glass icon. Below the search bar is a blue button that says "Office of the Vice Chancellor for Research".

The main navigation bar is blue and contains the following links: "About UNO Research", "For Researchers", "Partnership Opportunities", "Communications", and "Research Units".

Below the main navigation bar is a secondary navigation bar with the following links: "OSP Home", "About OSP -", "Award Lifecycle", "Forms & Tools", "Operating Standards & Procedures", "Resources -", "Training -", and "Contact Us -".

Below the secondary navigation bar is a breadcrumb trail: "UNC Research Home / Office of Sponsored Programs / Resources / Research Core Development".

The main heading is "RESEARCH CORE DEVELOPMENT".

The text below the heading reads: "Research Cores/Service Centers (RSC), commonly referred to as recharge units and/or research core facilities, are operational units that provide goods, specific technical, or administrative services to UNC-Chapel Hill (UNC-CH) users or external entities."

The text continues: "The Research Core Development (RCD) Team will offer a resource and team to provide campus additional support for RSC management. The RCD team, in a partnership between the [Office of the Vice-Chancellor for Research](#) (OVCR) and the [Office of Sponsored Programs](#) (OSP), will collaborate with OSP's Cost Analysis and Compliance unit and RSC leadership to develop and implement new capabilities and business processes designed to streamline core management, rate development, business workflows, and general core facility administration."

A dashed box contains the text: "Help us help you! To submit any additional items that you would like to see on our new webpage, please email RCD@unc.edu."

Below the dashed box is a navigation menu with the following links: "About", "Resources", "Research Core Agreements" (highlighted with a red box), "News & Events", "Contact Us", "FAQs", and "Feedback".

The main heading for the page is "Research Core Agreements".

The section heading is "Process".

The text below the section heading reads: "A service agreement should be in place before beginning any work for an external client. UNC-CH has a pre-approved agreement template that may be requested and used. OSP's Contracting team will work with RSCs to complete these agreements. **Use the buttons at the bottom of this page to access the online fillable forms. Once the form is complete, select the "Submit" button to route the request to the OSP Contracting Team.** Please see the [guidance](#) for more information. As a reminder, RSCs **DO NOT** have the ability to negotiate or sign their own agreements. Please contact OSPContracting@unc.edu with any questions."

Submission Options

- Request New Template
 - Timeline: 3-5 business days
- Submit an Agreement
 - Work can begin once customer has signed agreement
 - Timeline: UNC signature takes approx. 1-3 business days
- Submit Update Request
 - Amendments must be submitted individually for language or pricing updates
 - Timeline: Revised template takes approx. 3-5 business days
- Submit Change Request
 - If UNC template needs negotiation or customer requires use of their template
 - Timeline: Dependent upon length of negotiation

CDA/MTA Requests

- Core template contains CDA/MTA terms
- Separate CDA/MTA is not necessary
- If client requests more language, this can be negotiated into our contract
- Best option: one agreement that contains all necessary language
- Pre-contract CDA should be submitted via Alice
- MTAs should be submitted via Research Core Agreements Portal on RCD webpage

Master Agreements

May be possible
for services that
span multiple
projects

One agreement
with one client for
multiple projects

Projects must be
with same core

Recent Changes to Contract Template

- **Contract Length**
 - Based on project dates contained in attached quote
 - Or align with rate review dates
- **Auditing Language**
 - Customer may audit core; will reimburse core up to 20 hours at consultation rate
 - Language is available for inclusion and review
- **iLab User Creation**
 - If client intends to use iLab, client must set up iLab account for requests
- **Link to iLab/Infoporte now used as documentation of rates**
 - Removes risk of rate changes
 - Client agrees to pay published rate at time of service, not at time of contract execution
 - Contract rates are updated based on iLab/Infoporte
 - Not for every core

What Do I Do?!



Customer asks for one agreement for multiple cores

Due to the current billing process, if a customer wants to purchase services from multiple cores, an agreement will need to be executed with each core.



Core's rates change and there are outstanding contracts

If a Core's rates change during the term of an agreement, an amendment will need to be put in place to reflect the new rates. This should be submitted as an amendment in the RSC portal.

What Do I Do?!



You need a copy of a signed contract.

A copy of each fully executed agreement is maintained in OSP's Alice system. A request may be made to OSPContracting@unc.edu for a copy. The request should include the name of the Core, the PI and the Client name.



Customer changes its name or has been bought out by another company

If a customer is bought out or changes its name, a formal letter needs to be provided by the customer stating this and providing the new name.

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Questions?



These agreements appear to be for external customers who are businesses. What about work conducted for universities external to UNC where confidentiality agreements and other items aren't needed?





THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL