Contract Development Process

Overview
Contracts are required at any time that the university enters into an agreement with a non-university entity to exchange funds or services. Contracts related to training, deliverables, testing, services and outreach or other non-Office of Sponsored Programs (OSP) activities must follow this approval process. If you are not certain as to whether or not a contract is required, please contact your departmental fiscal officer.

The majority of domestic contracts are routed through the EHE Office of Research for processing. The EHE Office of Research will obtain all college signature approvals, then route the contract through the Office of Legal Affairs for approval and to be signed by the Senior Vice President for Business and Finance and CFO. International contracts are routed through the EHE Office of International Programs. Contact Anita Donaldson at donaldson.22@osu.edu for further information on International contracts.

The EHE Office of Research processes all non-OSP contracts and tracks their progress until completely executed with all signatures. Please do not sign a contract yourself. Only designated persons can sign on behalf of the university or college.

Initiator Tasks
To initiate the review of a contract, complete the EHE Office of Research Contract Routing Form and the Contract Cover Sheet available at http://go.osu.edu/ORContractForm. The Contract Routing Form will assist you in determining whether your contract can be routed through the Office of Legal Affairs contract process or if it should be processed by the university Office of Sponsored Programs (OSP) in accordance with university policies and procedures. The Contract Cover Sheet contains information specific to the contract as well as spaces for all required college signatures.

Your fiscal officer and department chair should review the contract and the budget. For all contracts associated with earnings fund, your fiscal officer will provide information on the appropriate chartfield and will provide the approved fee schedule. In order to avoid processing delays, please submit all contracts involving funds and/or fees to your fiscal officer for review and budget/fee schedules prior to submitting them to the EHE Office of Research. Your fiscal officer can then submit the contract to the EHE Office of Research on your behalf.

All contracts must include a signature page. The signature page must include a space for the college Dean, the Senior Vice President for Business and Finance and CFO, and any and all third-party designated signatures. For an example of a standard approved contract format (Memorandum of Agreement) which includes a signature page, please go to http://go.osu.edu/ORMOAExample.
Once the contract has been signed by the department chair and fiscal officer, attach the Contract Routing Form and Contract Cover Sheet to the contract and submit it to the EHE Office of Research via email at chacko.9@osu.edu.

College Review
The document is routed to the following offices for the following college signatures:

- EHE Office of Fiscal and Business Services (CFO for the College),
- EHE Office of Research (Richard Lomax), and
- EHE Office of the Dean (Cheryl Achterberg).

The contract and budget (if required) are reviewed to see whether the work that is described supports the mission of the college and that the budget reflects the work that is described. This review process can include questions to the initiator and requests for additional information and possible modifications.

University Review
Following approval on the college level, contracts are forwarded to the university’s Office of Legal Affairs to be reviewed from the legal perspective and then approved by Geoffrey S. Chatas, Senior Vice President for Business and Finance and CFO. This step of the process can also include questions to the initiator and requests for additional information and possible modifications.

Agency Signatures
After the Senior Vice President for Business and Finance and CFO signs the contract, an electronic version is emailed to the EHE Office of Research and forwarded to the department and the contract initiator. The contract initiator is responsible for obtaining agency signatures. A copy of the final contract with agency signatures should be emailed back to the EHE Office of Research staff for permanent storage and to be uploaded into a Contracts portal and shared drive so that they are available to fiscal team members. Please note that the contract will NOT be completely executed until this has taken place.

Contact Information
Contact Rebecca Chacko (chacko.9@osu.edu; 614-292-3351) for assistance with the development, review, and approval of a contract. Contact your department fiscal officer for help with budget development.