



Section 300: Proposal Preparation and Submission

OSR Policy 300.2 — Master Agreements and Task Orders

Responsible Officer:	Director
Responsible Unit:	Award Management
Effective date:	July 1, 2008
Last revised on:	October 17, 2008

Policy Statement

When the potential/probability exists for collaboration with a sponsor on several research projects, the University and the sponsor may elect to enter into a master agreement. Such agreements are established to define the terms and conditions applicable to any subsequent research project (known as a task order) conducted with that particular sponsor. Master agreements supersede task orders unless modified by authorized written amendments between the sponsor and the University.

Task orders, each with their own individual terms and conditions following those of the master agreement, are viewed as separate projects. Each requires preparation of an [eIPF](#) in RAMSeS and each receives a separate account number.

Initial task orders and those under master agreements with the State of North Carolina are negotiated and approved on behalf of the University by the Office of Sponsored Research ([OSR](#)) [Proposal Management](#) division. Subsequent task orders are negotiated and signed by OSR's [Award Management](#) division.

Reason for Policy

Maintaining master agreements with sponsors streamlines the review and approval of several projects under one agreement. This policy establishes the master agreement as the prime agreement between UNC Chapel Hill and the sponsor who provides funding for task orders under that agreement.

Exclusions/Exceptions

In general, master agreements may be modified only by written amendments between the sponsor and the University, executed by an authorized representative of each.



Procedures and Related Policies

Task orders are entered into [RAMSeS](#) using the same steps defined in *Policy 300.2, Procedure 1: Preparing, Submitting, Routing and Certifying an eIPF in Proposal Dashboard*. A completed, signed *Task Order Request Form* is required for approval by OSR prior to the initiation of the task order.

In addition, the following policies are directly related to this policy:

- [Policy 300.3](#) [Deadlines for Proposal Submissions to University Offices](#)
- [Policy 200.7](#) [RAMSeS](#)
- [Policy 200.7, Pro-1](#) [Obtaining Administrative Roles in RAMSeS](#)

OSR Research Tool Kits

None.

Contacts

Questions and concerns can be submitted online at [Ask OSR](#) or by using the [OSR staff directory](#). Within [RAMSeS](#), the “*Speak to Someone*” option assists in locating the staff member best suited to address project-specific issues.

References



[Research Administration Glossary at Carolina](#)

1. The University of North Carolina, Research and Sponsored Programs, *Master Agreements and Signature Authority*.
2. Office of Clinical Trials, Handbook, Master Agreements.

Revision History

Prior Revisions: The policies in the *Office of Sponsored Research Policies & Procedures Manual* supersede any OSR policies, procedures and appendices previously included in the *University Business Manual*, a publication of UNC Chapel Hill’s [Division of Finance](#).

