

Research Core Agreements Guidance

When a Research Core (Core) performs work for an external client, an agreement with that client should be in place before work begins. UNC-CH has a pre-approved agreement template that can be used to create agreements for external clients.

The Research Core Agreements section on the [Research Core Development \(RCD\) webpage](#) can be used by cores to submit a request for a new template, submit partially executed agreements for OSP Contracting signature, submit update request (amendment or new rates) or submit client agreements or negotiation requests.

Requests submitted via the [RCD webpage](#) will automatically route to the Office of Sponsored Programs (OSP) Contracting inbox and will be processed by an authorized signatory in OSP Contracting. Additional information can be found under “Research Core Agreements” in the FAQs on the [Research Core Development webpage](#).

REQUEST NEW TEMPLATE

Cores that already have a template do not need to request a new template. The Core can continue to use the existing template for external clients. If the template requires revisions or updates, please submit the “[Request New Template](#)” form.

If a new template is needed, submit this request via the “[Request New Template](#)” form. Once submitted, this information will route to OSP Contracting. OSP Contracting will enter the information into the template agreement and will send a completed template back to the Core representative. The completed template may then be used to create agreements with external clients.

SUBMIT AN AGREEMENT

Once an agreement has been executed by the client and is ready for full execution by UNC, the partially executed agreement may be submitted using the “[Submit an Agreement](#)” form. Simply upload the agreement and it will route to OSP Contracting for full execution. Once fully executed, OSP Contracting will send a copy of the agreement to both the external client and the core representative.

Work may begin under the agreement as soon as it is signed by the client (*UNC signature not required*).

Note: Core and departmental staff may not execute agreements on behalf of the University. Fully executed agreements must be signed by an authorized signatory in OSP.

SUBMIT UPDATE REQUEST

If you have an existing agreement and need an amendment made, such as extension, change of amount or services, then you can submit this request via the “[Submit Update Requests](#)” form. You can also use this form if the Core uses a Rate Worksheet in your agreement template. When these rates are updated then your Research Core template agreement should be updated. This will route updated rate information to OSP Contracting. OSP Contracting will then update your core’s template agreement and provide a revised template including the new rates.

You do **NOT** need to submit an update request if you use link to the rates on your website or you use custom quotes in your agreements.

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SUBMIT CHANGE REQUEST

Occasionally, the client will require that the Core use the client's own agreement, or that changes to the UNC template be made. If this is the case, submit the "[Submit Change Request](#)" form.

Along with providing general information, the Core representative will indicate if the client requires use of the client's agreement or if negotiation on UNC's template agreement terms is needed. Once the information and a copy of the client agreement (*as applicable*) is submitted via the web form, it will be routed to OSP Contracting. OSP Contracting will then contact the client for negotiation and execution of the agreement.

Note: If a client would like to use their agreement, OSP Contracting strongly encourages pushing back to the client to request use of the UNC agreement. Use of a client agreement may significantly delay the negotiation and execution process.

APPENDIX I

Research Core Agreement Web Form Decision Matrix

Request	Action
I need an agreement template	Request New Template
I need to update or change an existing template	Request New Template
I need to submit an agreement that has been signed by the client	Submit an Agreement
I need to negotiate terms with a client	Submit Change Request
Client has requested changes to UNC template agreement	Submit Change Request
Client requires use of client's agreement language	Submit Change Request
My core's rates have been updated	Submit Update Requests
I need an amendment to an existing agreement	Submit Update Requests