Memorandum of Understanding Instructions
FY 2018 Request for Partners

General Information:

A generic Memorandum of Understanding (MOU) form is provided; applicants may use this form or create an MOU that meets the same requirements. Duties and responsibilities of each party, as they relate to SNAP-Ed provision, must be clearly defined in simple language. Be specific about any financial or other resource obligations of each party and include dates of when actions are to be taken or completed. A third party with no other knowledge of the project must be able to easily read and understand the MOU. Submit unsigned new and renewal MOU with the FY 2018 proposal. **Signed MOU are due no later than September 30, 2017.**

About the MOU Form:

- Data can be entered only in form fields; these are the shaded areas of the form.
- Default text is contained in each field to assist applicants in completing the form quickly and easily. Replace the default text with actual text after reviewing each instruction.
- After a shortened name for each party is entered in the first paragraph, those names will automatically appear throughout the document. If the names need to be changed, edit the first paragraph and changes will be reflected throughout. To view the shortened name in the page header, click on the *Print Preview* button or select *File-Print Preview* from the main menu.
- You may submit either a one or a two-year MOU. Ensure the appropriate end date is used in section IX. Effective Date and Signature.
- The form may be saved before completion and returned to later for editing.

About the MOU Code:

The MOU Code provides a shorthand way to of referring to a specific MOU document. It is displayed on the *Program Delivery Sites* report, which is submitted as part of your SNAP-Ed plan, and it is used to indicate which locations (audiences) are covered by which MOU.

The MOU Code consists of two parts:

- **SNAP-Ed Partner Code.** This is a three-letter code assigned by the ME to uniquely identify each SNAP-Ed partner (party A). Returning partners should use the code assigned in prior fiscal years. The ME will assign a code for new applicants after receiving their intent to apply.
- **Entity Code.** This is a code assigned by the applicant to uniquely identify the school, school district, agency or organization with whom they're executing the MOU (party B).   Entity Codes may be **up to eight characters in length.** They must start with a letter and may include numbers, if needed, but special characters (e.g. slashes, commas) are not permitted. Returning applicants are encouraged to retain codes previously created when renewing MOU.

When completing your MOU form, enter both parts of the MOU Code separated by a dash. When logging your MOU into STARtracks, however, you will only need to enter Entity Code.

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Procedure:

The instructions below refer to three types of MOU:

- **New MOU**. These are MOU with organizations you're partnering with for the first time.
- **Renewal MOU**. These are MOU with organizations you partnered with in the past.
- **Effective MOU**. These are MOU that are still in effect with partner organizations (e.g., 2-year MOU originally submitted with the FY 2017 proposal)

1. **Prepare your MOU Document.** Download **FY18 MOU form**. Prepare a separate form for each new or renewal MOU.
   - Enter an MOU Code according to guidelines.
   - Complete Party A, Party B, Shortened Party A, and Shortened Party B.
   - Complete Sections 1, 3, 5, and 8.
   - Select year from drop down menu in Section 9. Complete form fields (NOT signatures) in Section 9.

2. **Log your MOU in STARtracks**. Go to the *Manage MOU* page in STARtracks and add or update MOU as indicated below.
   - New MOU
     - From the *MOU Task* dropdown, select *Add New or View Effective MOU*.
     - Click on the *Add* bar and complete a new row for each new MOU. (Note: The *Manage MOU* page will collect three new elements for FY18: *Entity Type, Assistance Provided* and *Assistance Received*. All are required.)
   - Renewal MOU
     - For *MOU Task,* select *Renew Expired MOU*.
     - Find the MOU you want to renew and click on it to select it. Then, click the *Renew Selected MOU* button. This will insert a new row with the same *Entity Full Name* and *MOU Code* as the selected MOU.* Select the *Fiscal Year Start* and *Fiscal Year End* dates indicated on your renewal MOU document. When you save your changes, the new MOU will disappear from the *Renew Expired MOU* view.
     - Switch to *Add New or View Effective MOU* view, find your renewal MOU, and enter data for the three new reporting elements: *Entity Type, Assistance Provided* and *Assistance Received*.
   - Effective MOU
     - These MOU should already be logged in STARtracks. Verify that effective MOU are logged properly by looking for them under *Add New or View Effective MOU*.
     - Enter data for the three new reporting elements: *Entity Type, Assistance Provided* and *Assistance Received*.
       - NOTE: Users are generally not permitted to edit an MOU after the *Date Executed* is filled in. However, if STARtracks is unlocked when you double click on a dated MOU, the row will open, but only the three new fields will be editable.

   When logging MOU in STARtracks, please ensure that *Entity Full Name* and *MOU Code* match the information entered on the FY18 MOU form. Also, make sure that *Fiscal Year Start* matches the start date on the MOU form (e.g., October 1, 2017 = 2018) and that *Fiscal Year End* matches the end date on the MOU form (e.g., September 30, 2019 = 2019).

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3. **Associate MOU with Program Delivery Sites in STARtracks.** Go to the *Manage Program Delivery Sites* page in STARtracks and associate sites with MOU as indicated below.
    - Search for the first location covered by the MOU, or if it's a new programming site, add it to the grid.
    - Expand the location so that audience information is revealed.
    - Double-click on the first audience row and select the corresponding *MOU Code* from the dropdown list. If multiple audiences are served at this site, select an *MOU Code* for each. (Note: Usually, one MOU covers all audiences served at a site. In some cases, however, different audiences may be covered by different MOU. For example, an elderly service center that includes a food pantry could have one MOU with the regional area agency on aging and a second MOU with the regional food bank.)
    - Repeat the steps above for each site covered by the MOU, and save changes when finished.

4. **Finalize and Submit your MOU Document**. When all program delivery sites have been assigned to the correct *MOU Code*, finalize and submit your MOU document as indicated below:
    - **Complete Section II.** On the *Manage MOU* page in STARtracks, select *MOU Location Listing* from the dropdown list in the lower left corner of the screen and click the adjacent *Go* button. The *MOU Location Listing* report will be generated in Excel format. Copy location names and addresses for the MOU you're finalizing and paste them into Section II of the corresponding **FY18 MOU form**.
    - **Complete Section IV.** On the *Manage MOU* page in STARtracks, select *MOU Assistance Listing* from the dropdown in the lower left corner of the screen and click the adjacent *Go* button. The *MOU Assistance Listing* report will be generated in Excel format. Copy assistance type, party A and party B for the MOU you're finalizing and paste that data into Section IV of the corresponding **FY18 MOU form**.
    - **Upload unsigned MOU.** Upload unsigned MOU to the partner portal, so that ME staff can review terms and conditions. Sites cannot be approved until signatures are obtained, however (see #5 below).

5. **Submit Signed MOU.** Present your unsigned MOU for signature by an authorized representative of each party. Submit signed MOU no later than September 30, 2017 by uploading them to the partner portal, or if the portal is locked, emailing them to your agency's assigned ME nutritionist. Do not submit signed original paper to the ME. Keep the originals for your files. Upon receipt, ME staff will enter the *Date Executed* on the *Manage MOU* page in STARtracks. Once this date has been entered in STARtracks, the record for the MOU will no longer be editable.