

Memorandum of Understanding Instructions

FY 2019 Request for Partners

General Information:

A Memorandum of Understanding (MOU) form is used to define the duties and responsibilities of two parties engaged in the delivery of SNAP-Ed. Use clear, simple language when completing an MOU; a third party with no other knowledge of the project must be able to easily read and understand it. Be specific about any financial or other resource obligations of each party and include dates of when actions are to be taken or completed. Submit unsigned MOU with the FY 2019 proposal. **Signed MOU are due no later than September 30, 2018.**

About the MOU Form:

- For returning applicants, MOU forms will be generated from the STARtracks reporting system. When an MOU form is exported from STARtracks, several sections will be fully or partially completed.
- You may submit either a one or a two-year MOU. Ensure the appropriate end date is used in section X. *Effective Date and Signature*.
- The form may be saved before completion and returned to later for editing.

Procedure:

1. Create your FY19 MOU in STARtracks

- a. Go to the *Administration/Locations/Manage MOU* page in STARtracks. By default you will see all of the entities you've partnered with in prior fiscal years.
- b. To execute an FY19 MOU with a **NEW ENTITY...**
 - i. Click on the *Add New Entity* bar
 - ii. Enter information about the entity you're proposing to partner with, as follows:
 1. **Entity Full Name.** Enter the full and official name of the organization.
 2. **Entity Code.** Assign a code to uniquely identify this entity. Entity codes may be **up to eight characters in length**. They must start with a letter and may include numbers, but special characters are not permitted.
 3. **Entity Type.** Select the option that best describes the new entity. For guidance on assigning an entity type, click on the "?" in the column header.
 4. **Street, City, State, Zip.** Enter the entity's primary address. This is usually the organization's main administrative office, not a program delivery site.
 5. When all required entity information is entered, click *Done*. Next, STARtracks will prompt you to enter data about the MOU partnership:
 - a. **FY Start, FY End.** These fields refer to the fiscal years covered by the MOU. *FY Start* will default to 2019 and should not be changed. *FY End* refers to the last fiscal year covered by the MOU. For a one-year MOU, select 2019; for a two-year MOU select 2020.
 - b. **Assistance Provided.** Click on the ellipse icon in this column and select all types of assistance that your organization will provide to Party B. For guidance on assigning assistance types, click on the "?" in the column header.
 - c. **Assistance Received.** Click on the ellipse icon and select all types of assistance that your organization will receive from Party B. For

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guidance on assigning assistance types, click on the “?” in the column header.

- d. **Date Executed.** This refers to the date of last signature on the MOU document. The ME will enter that date upon receipt of a signed MOU.
- e. When all required MOU information is entered, click *Done*.
- f. Click *Save Changes* to save your new FY19 MOU.

- c. To execute a new MOU with an **EXISTING ENTITY**...
 - i. For MOU beginning in FY19, the entity’s primary address must be entered into STARtracks. To enter address data for an existing entity, double click on the entity row, type in *Street, City, State* and *Zip*, and click *Done*.
 - ii. Next, click on the triangle to the left of the entity name to expand its MOU history.
 - iii. Click on the *Add New MOU* bar. If the entity address is not complete when you click this bar, STARtracks will prompt you to enter address data before continuing. If entity address is complete, a new row will open in the MOU history. Enter data about the MOU partnership as indicated in section 5 above.

2. Assign program delivery sites to the new FY19 MOU

- a. Go to the *Administration/Locations/Manage Program Delivery Sites* page in STARtracks, making sure that *Fiscal Year* is set to 2019. On this page you will see your proposed FY19 program delivery sites.
- b. Find the first site that needs to be assigned to the new MOU you created in step 1. (If that site has not yet been entered into STARtracks, follow the instructions for managing *Program Delivery Sites* to add it.)
- c. Click on the triangle to the left of the site name to see the audiences proposed for that site.
- d. Double-click on the first audience that will be covered by the new FY19 MOU; this will open the audience for editing. (NOTE: Usually, one MOU covers all audiences served at a site. In some cases, however, 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.)
- e. From the *MOU Code* dropdown list, select the entity code associated with the new FY19 MOU and click *Done*. If the new FY19 MOU will cover additional audiences served at this site, select an *MOU Code* for each.
- f. Repeat the steps 2a-2e above for each site covered by the MOU, and save changes when finished.

3. Export your MOU document

- a. When all sites covered by the new FY19 MOU have been assigned to the corresponding entity code, return to the *Administration/Locations/Manage MOU* page in STARtracks.
- b. In the lower left corner of the page, select the entity code for the new FY19 MOU from the dropdown list.
- c. Click the *Export MOU Template* button.
- d. A dialog box will open, reminding you to confirm that all STARtracks data are correct and complete before continuing; click OK.

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- e. When the export is complete, open your MOU document and check it thoroughly. In particular, review the following sections, as follows:
 - i. **Section I. Parties.** If party names, abbreviations or Party B address are incorrect, correct those fields in the *Manage MOU* page in STARtracks, then export the MOU template again.
 - ii. **Section III. SNAP-Ed Locations.** If any locations are missing, or if any were mistakenly assigned to this MOU, update *MOU Code* assignments on the *Manage PDS* page in STARtracks, then export the MOU template again.
 - iii. **Section V. Responsibilities under this MOU.** If the list of options for *Assistance Provided* or *Assistance Received* is incorrect, correct them on the *Manage MOU* page in STARtracks, then export the MOU template again.

4. Finalize your MOU document

- a. While some sections of the MOU document will be completed with data from STARtracks, others must be completed manually after the document is exported. Sections requiring manual input are highlighted in gray and include the following:
 - i. **Section II, Purpose and Scope.** Using plain, simple language, complete the sentence provided by describing the nature of the relationship between the two parties as it pertains to SNAP-Ed.
 - ii. **Section IV, Background.** Briefly describe each party, including type of organization, mission, and services provided, including current and former ties to SNAP-Ed.
 - iii. **Section V, Responsibilities Under This MOU.** This section will be partially completed by STARtracks. In particular, STARtracks will identify the assistance types provided and received by SNAP-Ed. For each assistance type noted, enter a brief description of responsibilities that relate to that assistance type. For example, if the MOU indicates that assistance type *A) Advertising* will be provided by SNAP-Ed, you might enter the following description: *Provide marketing materials for Party B to advertise SNAP-Ed programming.* Click the “?” in the *Assistance Provided* or *Assistance Received* header on the *Manage MOU* page in STARtracks for sample descriptions.
 - iv. **Section VI, Terms of Agreement.** Describe the terms and conditions under which this agreement may be modified or terminated by the parties.
- b. After your document is complete, save it on your computer or network drive using the default report name followed by the *Entity Code* for party B (e.g., *FY19_MOU_Template-ABCD*)
- c. Upload your completed (unsigned) MOU to the Pennsylvania SNAP-Ed Partner Portal, so that ME staff can review terms and conditions.
- d. After the ME approves the MOU, print it and present it for signature by an authorized representative of each party. Submit signed MOU no later than September 30, 2018 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 originals 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 MOU record will no longer be editable in STARtracks.