

Memorandum of Understanding Instructions

FY 2021 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 2021 proposal. **Signed MOU are due no later than September 30, 2020.**

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, most sections will be fully completed.
- After exporting your MOU document, review it carefully. If data originating in STARtracks needs to be modified, make the changes in STARtracks, and then export your MOU document again.
- 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*.

Procedure:

1. Create your FY21 MOU in STARtracks

- a. Go to the *Administration/Location/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 FY21 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 2021 and should not be changed. *FY End* refers to the last fiscal year covered by the MOU. For a one-year MOU, select 2021; for a two-year MOU select 2022.
 - b. **II. Purpose.** When you click on this cell, a dialog will open. Using the prompt and help text provided, describe the nature of the relationship between the two parties as it relates to SNAP-Ed. (Note: Roman numerals in the column header refer to the section in the MOU document where STARtracks data will be merged.)
 - c. **IV. Background-Party B.** When you click on this cell, a dialog will open. Using the prompt and help text provided, describe Party B,

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e.g., type of organization, mission, services provided, etc. (Note: Background data for your organization (Party A) is saved elsewhere in STARtracks; contact the ME if changes are needed.)

- d. **Assistance Provided (V. Responsibilities—Party A).** When you click on the ellipse icon in this column, a dialog will open. In the *Assistance Type* column, select the first type of assistance that your organization will provide to Party B. In the *Description* column provide additional details about the assistance you'll provide. (For guidance on selecting and describing assistance provided, click on the "?" in the column header of the main grid.)
 - e. **Assistance Received (V. Responsibilities—Party B).** When you click on the ellipse icon in this column, a dialog will open. In the *Assistance Type* column, select the first type of assistance Party B will provide to your organization. In the *Description* column provide additional details about the assistance you'll receive. (For guidance on selecting and describing assistance received, click on the "?" in the column header of the main grid.)
 - f. **Terms.** When you click on this cell, a dialog will open. Using the help text provided, describe the conditions under which the MOU agreement can be modified or terminated.
 - g. **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.
 - h. When all required MOU information is entered, click *Done*.
 - i. Click *Save Changes* to save your new FY21 MOU.
- c. To execute a new MOU with an **EXISTING ENTITY...**
- i. For MOU beginning in FY21, 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 FY21 MOU

- a. Go to the *Administration/Location/Manage Program Delivery Sites* page in STARtracks, making sure that *Fiscal Year* is set to 2021. On this page you will see your proposed FY21 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 FY21 MOU; this will open the audience for editing. (NOTE: Usually, one MOU covers all audiences served at a site. In

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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 FY21 MOU and click *Done*. If the new FY21 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/audience covered by the MOU, and save changes when finished.

3. Export your MOU document

- a. When all sites covered by the new FY21 MOU have been assigned to the corresponding entity code, return to the *Administration/Location/Manage MOU* page in STARtracks.
- b. In the lower left corner of the page, select the entity code for the new FY21 MOU from the dropdown list.
- c. Click the *Export MOU Template* button.
- d. A dialog box will open, with a reminder to confirm that all STARtracks data are correct and complete before finalizing your MOU; click OK.
- e. When the export is complete, open your MOU document and check it thoroughly. If data originating in STARtracks needs to be corrected:
 - i. **Sections I.b, II, IV.b, V, VI and X.** Return to the *Manage MOU* page, make the necessary corrections and export the MOU document again.
 - ii. **Section III.** Return to the *Manage Program Delivery Sites* page. If a site/audience covered by the MOU is missing from the MOU document, find it in the grid and assign the new MOU Code. If a site/audience that isn't covered by the MOU is listed in the MOU document, find it in the grid and unassign the MOU Code. When finished, export the MOU document again.
 - iii. **Sections Ia, IVa.** Contact the ME if changes are needed for these sections.
- f. After all corrections have been made in STARtracks, export your final MOU document.

4. Finalize your MOU document

- a. Following the directions in section III, delete surplus rows or contact the ME for MOU covering more than 35 locations.
- b. Update boilerplate sections of the MOU document, if needed. (This refers to data that's not merged from STARtracks.) Boilerplate updates are unnecessary in most cases, but if you feel changes are needed, make them directly in the MOU document and highlight them in yellow, so the ME can review in greater detail.
- c. 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., *FY20_MOU_Template-ABCD*)
- d. Upload your completed (unsigned) MOU to the PA SNAP-Ed Partner Portal, so that ME staff can review it.
- e. 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, 2020 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.