



FINANCE AND ADMINISTRATION

John Harman, MBA, CGMA, CMPE Vice President
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Effective Date: January 10, 2024

Re: Delegation of Contract Authority

As provided in the Oregon Institute of Technology Policy, Section 580-061-0020, the following individuals are designated Contract Officers authorized to enter Contracts on behalf of the Oregon Institute of Technology (“University”), subject to the below limitations. This document supersedes all other institutional designations.

PRESIDENT’S OFFICE	
President	<ul style="list-style-type: none"> • All Contracts with Vice President Finance & Administration or General Counsel as a second signature
General Counsel	<ul style="list-style-type: none"> • Contracts as delegated by Vice President Finance & Administration • Contracts for the provision of legal services • Settlement Agreements or any other Contract that includes a release of claims
FINANCE & ADMINISTRATION	
Vice President Finance & Administration	<ul style="list-style-type: none"> • All Contracts <u>**</u>
Associate Vice President for Financial Operations - Controller	<ul style="list-style-type: none"> • Banking Agreements • Checks

** The Contract Administrator will be required to co-sign the Contract to indicate that they have read the Contract, agree with all terms and conditions of the Contract, and are willing to be bound by all Contract provisions.

	<ul style="list-style-type: none"> • Letters of credit and credit applications • Wire and cash transfers • Contracts as delegated by Vice President Finance & Administration
Director of Audit & Compliance	<ul style="list-style-type: none"> • Audit and financial statement documents • Wire and cash transfers • Contracts as delegated by Vice President Finance & Administration
Assistant Director Budget Office	<ul style="list-style-type: none"> • Wire and cash transfers
Associate Vice President Human Resources	<ul style="list-style-type: none"> • Employment agreements
Director Procurement, Contracts & Risk Management	<ul style="list-style-type: none"> • All Contracts with a value up to \$250,000 **, except: <ul style="list-style-type: none"> ○ Banking Agreements, Gift Agreements, Intellectual Property Agreements, Real Estate Agreements, Settlement Agreements, Sponsored Project Agreements, and Sponsored Project Proposals. • Insurance applications, claims, and policies
ACADEMIC AFFAIRS	
Provost	<ul style="list-style-type: none"> • Articulation and other academic agreements • Employment agreements with faculty • All Grants • All MOUs
Vice Provost Research & Academic Affairs	<ul style="list-style-type: none"> • All Grants • Contracts to acquire specific goods and/or services to accomplish the goals and objectives authorized under a Grant

	<ul style="list-style-type: none"> • Intellectual Property Agreements • MOUs related to research, sponsored projects, or partnerships • NDAs related to research or sponsored projects • Research-related Contracts • Sponsored Projects Agreements • Sponsored Project Proposals
Executive Director of Sponsored Projects & Grants Administration	<ul style="list-style-type: none"> • All Grants with a value up to \$750,000
Deans	<ul style="list-style-type: none"> • MOUs related to each Dean’s respective college
Vice President for Advancement	<ul style="list-style-type: none"> • Gift Agreements <i>without</i> university matching requirements • Gift Agreements <i>with</i> university matching requirements require Vice President Finance & Administration as a second signature

DEFINITIONS
Banking Agreement: A written agreement with a commercial bank or Oregon State Treasury (OST) for banking and/or related financial services governing the creation and establishment of accounts and administrative controls, including, but not limited to, user access, rights, and responsibilities.
Contract: A written agreement for sale or other disposal, or a purchase, lease, rental, or other acquisition, by the University of personal property, services, including personal or professional services, public improvements, public works, minor alterations, or ordinary repair or maintenance necessary to preserve a public improvement. The term Contract includes Banking Agreements, Gift Agreements, Intellectual Property Agreements, Non-Disclosure Agreements, Real Estate Agreements, and Sponsored Project Agreements. The term Contract does not include Grants.
Contract Administrator: University representative responsible for the daily administration of the Contract, which includes, but is not limited to, monitoring, tracking, and reporting on Contract performance. The Contract Administrator performs tasks to ensure that all Contract requirements are fulfilled, terms and conditions are met, and administrative processes are performed in a timely manner. The Contract Administrator remains responsible for the overall administration of the Contract.
Gift Agreement: A written agreement between the University and a donor that documents the terms and conditions of a philanthropic gift to the University.
Grant: (1) A written agreement under which the University receives money, property, or other assistance, including, but not limited to, federal assistance that is characterized as a grant by federal law or regulations, loans, loan guarantees, credit enhancements, gifts, bequests, commodities, or other

assets, from a grantor for the purpose of supporting or stimulating a program or activity of the University and in which no substantial involvement by the grantor is anticipated in the program or activity other than involvement associated with monitoring compliance with the grant conditions; or (2) a written agreement under which the University provides money, property, or other assistance, including, but not limited to, federal assistance that is characterized as a grant by federal law or regulations, loans, commodities, or other assets, to a recipient for the purpose of supporting or stimulating a program or activity of the recipient and in which no substantial involvement by the University is anticipated in the program or activity other than involvement associated with monitoring compliance with the grant conditions.

Intellectual Property Agreement: A written agreement that grants a license or an option or assigns an interest in intellectual property, which may include provisions regarding royalty distributions or transfer of equity interests to the University. The term Intellectual Property Agreement also includes, but is not limited to, royalty distribution agreements, collaborative research agreements, agreements for accepting equity in companies that have licensed Oregon Institute of Technology intellectual property, powers of attorney for patent prosecution, and documents required by the United States Patent and Trademark Office (USPTO) related to patent applications.

Memorandum of Understanding (MOU): A written document between the University and one or more third parties which is not legally enforceable by either party. MOUs often express an intent to work together toward a common goal or interest. An MOU must contain a clause substantially similar to the following: “Nothing in this agreement creates any legally binding obligation on either party. This agreement cannot be enforced by any court or tribunal. Nothing in this agreement is to be construed to give rise to any claim, for damages or otherwise, against any party.”

Non-Disclosure Agreement (NDA): A written agreement between the University and one or more third parties, which outlines confidential material, knowledge, or information that the parties wish to share and which the parties agree not to disclose to third parties. An NDA may sometimes be referred to as a confidentiality agreement, a confidential disclosure agreement, a proprietary information agreement, a confidential information agreement, or similar title.

Real Estate Agreement: A written agreement for the lease, acquisition, or disposition of any interest in real property or improvements to real property, including leases, purchase and sale agreements, options to purchase, easements, etc.

Settlement Agreement: A legally binding written agreement between the University and another party to actual or potential litigation by which each party agrees to a resolution of the underlying dispute.

Sponsored Project Agreement: A written agreement providing funds from a sponsor to a recipient to support a defined scope of work for research or other scholarly activity, including Grants, Contracts, cooperative agreements, acceptances of awards, and subawards issued by the University under a sponsored Grant or Contract. The term Sponsored Project Agreement includes Non-Disclosure Agreements (NDAs) that arise in the context of research and certifications or assurances by the University related to research Grants, proposals, acceptances of awards, and Contracts.

Sponsored Project Proposal: A written application, proposal, or bid for funding from an external sponsor for a specific project. Sponsored Project Proposals may include certifications and assurances by the University related to research Grants, proposals, and Contracts.

DocuSigned by:

John Harman

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John Harman, MBA, CGMA, CMPE

Vice President Finance and Administration