

Instructions for BIA to begin a new agreement with a CESU Network Partner:

- BIA staff/manager at a **BIA Division/Region/Agency** office requests from BIA Tribal Resilience Program (TRP) the following:
 - **Framing document** (for SOW)
 - **ASAP enrollment form** (system from where the **CESU partner** withdraws their funds)
 - **Form for Justification for Financial Assistance for Limited or No Competition**
- **Framing Document:**
 1. The **BIA Division/Region/Agency** office fills out the general Framing Document (purpose, SOW, budget, signatory POCs and addresses, etc.). **BIA Division/Region/Agency** office fills this out w/the **CESU partner** (university, research non-profit, tribe) they want to work to harmonize their SOWs, timelines, and budgets. The **CESU partner** will likely know who to work with on the university signatory side, but if not, look up the CESU and university contact at the CESU website: <http://www.cesu.psu.edu/>.
 2. **BIA Division/Region/Agency** office returns Framing Document to Grants and Agreements Officer (Jo Ann Metcalfe jo.metcalfe@bia.gov, Central Office (may cc the BIA Tribal Resilience Program (TRP) Acting Coordinator, rachael.novak@bia.gov) - even if it's not TRP-related, TRP manages these for BIA in terms of distributing info on this partnership mechanism.)
 3. Grants and Agreements Officer will use it to populate the cooperative agreement and prepare the funding document.
- **ASAP enrollment form**
 1. **BIA Division/Region/Agency** office needs to ensure the **CESU partner** is enrolled with an **ASAP account with BIA** (they might mistakenly think they're ok with one with another fed agency but they need one specifically with BIA). ASAP is the system where the university partner withdraws their funds from as they progress along in the SOW.
 2. If the **CESU partner** is not currently enrolled in ASAP w/BIA, the **BIA Division/Region/Agency** needs to send the ASAP form to their **CESU partner**. The **CESU partner** should start on that quickly so all can move forward in a timely way. This can take 2-3 weeks to process.
- **Form for Justification for Financial Assistance for Limited or No Competition**
 1. **BIA Division/Region/Agency** office fills out the form for **Justification for Financial Assistance for Limited or No Competition** (see bracketed and bolded language to fill out in the form). The language cited in the FAR exemption for CESU coop agreements is already there (competition is "strongly encouraged" but not required). (Ask TRP if you need examples.)
 2. **BIA Division/Region/Agency** office returns the filled out **Justification for Financial Assistance for Limited or No Competition** to Grants and Agreements Officer (JoAnn Metcalfe jo.metcalfe@bia.gov) may also cc the BIA TRP Acting Coordinator, rachael.novak@bia.gov).
- **Purchase Request (PR)**
 - **BIA Division/Region/Agency** office routes a signed PR from their division/region/agency office to Grants and Agreements Officer (JoAnn Metcalfe jo.metcalfe@bia.gov). Grants and Agreements Officer will need this to generate the funding agreement.
- **Signatures**
 - Grants and Agreements Officer sends the **funding agreement and coop agreement package** that is generated from the framing document back to the **BIA Division/Region/Agency** office for signature and asks the BIA staff to then send the package to the **CESU partner** for signature. **BIA Division/Region/Agency** office needs

to send this back to Grants and Agreements Officer (JoAnn Metcalfe jo.metcalfe@bia.gov) may also cc the BIA TRP Acting Coordinator, rachael.novak@bia.gov).

- The **BIA Division/Region/Agency** office should emphasize to the **CESU partner** the quarterly Reporting requirements/dates to meet listed in the coop agreement. **CESU partner** needs to send these to the Project Officer (PO) at the **BIA Division/Region/Agency**. Without these quarterly reports, the PO (whether **BIA Division/Region/Agency** office or TRP) can't approve the drawdown of funds.
- **COR Certification**
 - The Project Officer (PO) at **BIA Division/Region/Agency** office needs their **COR certification** and includes it in the file so they are approved to sign off on funding drawdowns (the PO will be getting these from Kevin Herrera and/or Jo Ann Metcalfe).