Instructions on how to help a new BIA staff/manager to begin a coop 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) which contains pertinent information
  - ASAP enrollment form (system from where the university partner draws their funds)
  - All solicitations must include an ASAP Recipient ID or ASAP enrollment status
  - 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, budgets on both ends. 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/](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 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 university is enrolled with an ASAP account with BIA (they might mistakenly think they're ok w/one w/another fed agency but they need one specifically w/BIA). ASAP is the system where the university partner draws their funds from as they progress along in the SOW.
  2. If the academic partner is not yet enrolled in ASAP w/BIA, the BIA Division/Region/Agency needs to send the ASAP form to their university partner. The university should start on that quickly so all can move forward in a timely way. This can take 2-4 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 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 which begins with 002 for a grant or cooperative agreement requisition.

- 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 University partner for signature. BIA Division/Region/Agency Office needs to send this back to Grants and Agreements Officer (JoAnn Metcalfe.
The BIA Division/Region/Agency Office should emphasize to the academic 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 Office. Without these quarterly reports, the PO (whether BIA Division/Region/Agency Office or TRP) can't approve the drawdown of funds.

- **COR Certification**
  - Make sure the Project Officer (PO) at BIA Division/Region/Agency Office has 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 Tatiana Ronning and/or Jo Ann Metcalfe).