

Procedures for Delegation of Signature Authority Policy

Appendix 1 – Sample Delegation Document

(to be printed on University letterhead)

I, < enter name and title >, hereby delegate to < enter name and title > my authority under the University of Montana Contract Approval and Signature Authority Policy to sign the following type(s) of Contracts:

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This delegation is limited to Contracts involving a total University expenditure of \$ _____ or less.

This delegation shall remain in effect until revoked by me or my successor, or upon the end or transfer of employment from the Office of _____.
{Alternative: This delegation shall remain in effect until [end date].}

_____	_____
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Signature	Date

Title	

Note: original to department files, copy to Office of Legal Counsel

Appendix 2 – Delegation Summaries

The tables presented here indicate types of contracts in which signature authority has been delegated and may not be further delegated. Contracts must be signed by one of the parties indicated as having authority to sign, by the immediate supervisor of the individual designated as having signature authority below, or by the President. Individuals who sign contracts should ensure that prior to signing, the contracts have been appropriately reviewed.

Affiliation Agreements		
Type of Contract	Routing for Review	Authority to Execute
Academic agreements with foreign institutions	VP for Educational Initiatives and Innovation Legal Counsel	President
Academic agreements with other institutions/entities	Dean Legal Counsel Dean of Graduate Studies <i>If graduate program</i>	Director of Academic Budgets and Personnel; Provost
Internship Placement Agreements	Director of Experiential Learning & Career Services	Director of Academic Budgets and Personnel; Provost

Athletic Agreements		
Type of Contract	Routing for Review	Authority to Execute

Multi-year Coach Contracts	Athletic Director Legal Counsel President	Commissioner of Higher Education	
Construction Contracts			
Type of Contract	Routing for Review	Authority to Execute Contracts less than \$75,000	Authority to Execute contracts over \$75,000
Physical Plant Construction	Facilities Services Director Associate Director, Planning, Design & Construction State A&E, if required	VP Operations & Finance	State A&E unless delegated to VP O&F
Modification/alteration to buildings	Facilities Services Director Associate Director, Planning, Design & Construction State A&E if required	VP Operations & Finance	State A&E unless delegated to VP O&F

Employment Agreements		
Type of Contract	Routing for Review	Authority to Execute
Offer/Hire Letters Tenure/Tenure Track Faculty	Dept. Head Dean HR Provost	Provost
Offer/Hire Letters Contract Professionals – BOR	Dept. Head/ Director HR	Appropriate VP/ Dean
BOR Contracts	President HR	President

Letter of Appointment – Adjunct; non-tenured faculty; research professional; grant funded professional	Dept. Head HR	Appropriate VP/ Dean
Summer session appointments	Dept. Head HR Dean	Appropriate Dean
Graduate Research/Teaching Assistant Contracts	Funding approver Dept. Chair	Appropriate VP
Severance/Separation Agreements	HR Legal Counsel Appropriate Dean/Director/ VP/President	VP O&F

Facilities Use		
Type of Contract	Routing for Review	Authority to Execute
Sports Facilities	Adams Center Director Senior Associate Athletic Director Facilities & Events	Athletic Director
Missoula College Facilities	Associate Dean	Conference and Event Services- Director Event Support & Planning

Filming on Campus	Legal Counsel Marketing & Communications News Service Associate Director	VP Marketing & Communications
Outdoor Locations Use	AVP Campus Operations, Preparedness & Response	Director Conference & Event Services- Director Event Support & Planning
Other Facilities Use	AVP Campus Operations, Preparedness & Response Applicable Building Manager/Dean	Director Conference & Event Services- Director Event Support & Planning

Federal and State Regulatory Agreements		
Type of Contract	Routing for Review	Authority to Execute
Permits, Licenses, Declarations, applications filed with state local or federal regulatory agencies on behalf of UM	Dept. Head Safety & Risk Management Facilities Director	Appropriate Director

Intellectual Property		
Type of Contract	Routing for Review	Authority to Execute
Option or License Agreement (University owned inventions or creative works)	AVP Research Compliance / Tech Transfer	AVP Research Compliance / Tech Transfer
Material Transfer Agreement	AVP Research Compliance / Tech Transfer	AVP Research Compliance / Tech Transfer

Intellectual Property Assignment (sale of University IP rights)	AVP Research Compliance / Tech Transfer	VP Research
Non-Use Non-Disclosure Agreement (Confidentiality Agreement)	AVP Research Compliance / Tech Transfer	AVP Research Compliance / Tech Transfer
Research Collaboration or Inter-Institutional Agreement	AVP Research Compliance / Tech Transfer	AVP Research Compliance / Tech Transfer
Revenue Sharing Agreement	Faculty AVP Research Compliance / Tech Transfer	n/a
Research Memorandum of Understanding (MOU) (no financial terms)	Faculty Dept. Head	AVP Research Compliance / Tech Transfer
Inventor Assignment Agreement	AVP Research Compliance / Tech Transfer	AVP Research Compliance / Tech Transfer
Patent and Trademark Prosecution Documents	AVP Research Compliance / Tech Transfer	AVP Research Compliance / Tech Transfer
UM Brand Trademark Licensing and Marketing	Director of Trademarks and Licensing	Director of Trademarks and Licensing
UMOnline Course Authorship Agreements	Program Director	VP Educational Initiatives and Innovation

Lease Agreements		
Type of Contract	Routing for Review	Authority to Execute
Equipment Lease/ Use agreement (excluding research leases) <i>UM as lessor</i>	Dept. Head/Dean Legal Counsel If research equipment, AVP Research Compliance/Tech. Transfer	VP O&F If research equipment, AVP Research Compliance/Tech. Transfer

Real Property Leases 5 years or less <i>(land and building space)</i> <i>UM as Lessee</i>	Dept. Head/Dean Facilities Services Director Legal	VP O&F
Real property Leases > 5 year term or \$25,000 annual rent <i>UM as Lessee</i>	Dept. Head/Director Legal Counsel BOR	VP O&F
Real Property Lease 2 years or less or renewal <i>UM as lessor</i>	Dept. Head/Dean Facilities Services Director Legal Counsel If research facility/lab, AVP Research Compliance/Tech. Transfer	VP O&F If research facility/lab, AVP Research Compliance / Tech. Transfer
Real Property Lease > 2 years <i>UM as lessor</i>	Dept. Head/Dean Facilities Services Director Legal Counsel If research facility/lab, AVP Research Compliance/Tech. Transfer BOR	VP O&F If research facility/lab, AVP Research Compliance / Tech. Transfer

Litigation Settlements		
Type of Contract	Routing for Review	Authority to Execute

All litigation settlements or payments	Legal Counsel President	VP O&F
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Purchasing Agreements

The State of Montana General Services Division entered into a [Procurement Delegation Agreement](#) (PDA) with UM. This agreement allows the UM Procurement Office to further delegate purchasing authority across UM and to affiliate campuses. The authority granted is in accordance with the Procurement Delegation Agreement.

The matrix below provides signature authority levels. There are some exceptions to this matrix, which are too extensive to include below. For example, departments are not authorized to issue contracts for vehicles, photocopiers, etc. When buying goods and services on behalf of your department, please ensure you are authorized to sign the contract (see Contract and Signature Authority Policy). When in doubt, please contact the Procurement Office prior to signing any document that legally binds the University. The University must comply with the Montana Procurement Act, Title 18 of the Montana Code Annotated.

Please refer to the [UM Procurement website](#).

The University of Montana, including departments and affiliate campuses, must use the most current form of the UM Standard Contract Language (Standard Statements and Boilerplate Terms and Conditions), RFP templates, Limited Solicitation forms, Sole Source/Sole Brand Justification forms, and all pertinent standard statements and standard forms in their entirety unless exceptions are approved by the General Services Division.

The UM Office of Legal Counsel must approve any contract that is not an approved UM template, prior to award.

All vendor requests for exceptions to UM's Standard Contract Language or contract templates requirements must be approved in writing by UM Office of Legal Counsel, and in certain instances, the State Procurement Bureau.

The following table identifies who has authority to sign contracts as articulated in the Procurement Delegation Authority from the State of Montana.

Type of Contract	Authority to Execute Contracts up to \$25,000*	Authority to Execute Contracts up to \$50,000*	Authority to Execute contracts up to \$250,000*
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"Controlled Items" such as New Vehicles, Photocopiers, etc.	UM Procurement Office	UM Procurement Office	UM Procurement Office
Departmental Purchase Order (DPO)	All UM departments and affiliate campuses	UM-Missoula; Auxiliary Services Facilities Services	UM Procurement Office
Contracted Services Agreement Note: Departments must obtain OSP signature on any CSA over \$5,000 using OSP funds	All UM departments and affiliate campuses	UM-Missoula; Auxiliary Services Facilities Services	UM Procurement Office
Cooperative Agreements: Inter-governmental agreements for research purposes	All UM departments	UM-Missoula; Auxiliary Services Facilities Services	UM Procurement Office
Cooperative Agreements with Montana political subdivisions or other state or local governments Note: Departments must obtain prior approval from State Procurement Bureau (SPB) prior to contract award.	All UM departments and affiliate campuses	UM -Missoula -Auxiliary Services Facilities Services -Prior approval is required from the State Purchasing Bureau	UM Purchasing Department with prior approval from the State Purchasing Bureau
No Cost Contracts	All UM departments and affiliate campuses	UM -Missoula -Auxiliary Services Facilities Services	UM Procurement Office

* The authority granted above is in accordance with the Procurement Delegation Agreement.

Real Property		
Type of Contract	Routing for Review	Authority to Execute
Sale	Legal Counsel President BOR Board of Land Commissioners	President or designee
Exchange	Legal Counsel President BOR Board of Land Commissioners	President or designee
Easement	Legal Counsel President BOR	President or designee

Research Agreements		
Type of Contract	Routing for Review	Authority to Execute
Federal, state grants, contracts and cooperative agreements for performance of research	OSP	Director OSP
Sponsored Research Agreements with private entities for research	OSP	Director OSP
Subcontracts	OSP	Director OSP

Business Assoc. Agreements (HIPAA); Data Use /Sharing Agreements	AVP Research Compliance / Tech Transfer	AVP Research Compliance / Tech Transfer
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Other Agreements		
Type of Contract	Routing for Review	Authority to Execute
Any contract or agreement not specified	Legal Counsel Dean/Director Appropriate VP	VP O&F