



University of California  
Office of the President

Vice President—  
Research & Graduate Studies

Research Administration Office

# Memo Operating Guidance

No. 08-08  
October 2, 2008

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## CONTRACT AND GRANT OFFICERS

### **Subject: Federal Standard Research Terms and Conditions for Research and Research-Related Grant Awards**

Effective July 1, 2008, Federal research agencies and awarding offices participating in the Federal Demonstration Partnership (FDP) began incorporating the Standard Research Terms and Conditions, to the maximum practicable extent, in their research and research-related grant awards to organizations that are subject to 2 CFR Part 215 (OMB Circular A-110).

These Research Terms and Conditions are largely based on the terms and conditions that have been utilized for a number of years by the FDP.

Other Federal agencies and awarding offices that are not participating in the FDP are encouraged to use these Standard Research Terms and Conditions in awards to organizations that are subject to 2 CFR Part 215 with the core set of standard requirements. Each Committee on Science (CoS) member agency (regardless of whether they are participating in the FDP) is required to post its plan for implementing the administrative requirements either at the Research Business Models (RBM) subcommittee site, <http://rbm.nih.gov>, or at its own Web site (in which case the RBM subcommittee will provide a link from its site to the agency's location).

These Federal agencies and awarding offices may supplement the core set with agency specific, program specific, or award specific administrative requirements, but should limit supplemental requirements to those that are: (1) Consistent with 2 CFR part 215 or required by a statute that supersedes that part; and (2) necessary for programmatic purposes or good stewardship of Federal funds.

\*Note: The addressees above represent the standard distribution of Contract and Grant Memos. Additional addressees, if any, may be added based on the subject of the Memo. See cc's.

The Government-wide core set of Standard Research Terms and Conditions and other pertinent documents are posted on the National Science Foundation (NSF) website at:

<http://www.nsf.gov/bfa/dias/policy/rtc/index.jsp>. The Research Terms webpage includes:

- The Research Terms & Conditions Federal Register Notice and Policy Letter;
- The Research Terms & Conditions Implementation Statements; (NSF will attempt to consolidate as many of the statements as possible on their site)
- The Research Terms & Conditions;
- The Research Terms & Conditions Appendix B - Subaward Requirements;
- The Research Terms & Conditions Appendix C - National Policy Requirements;
- The Research Terms and Conditions Agency Specific Requirements; and,
- Relevant Links.

### **Subaward Templates**

Be sure to carefully review your award documents and flow down the appropriate terms to your subawardees (i.e., FDP Terms and Conditions if they are still being utilized on prior awards, or the Standard Research Terms and Conditions if they are incorporated in new awards).

The subaward agreement form has been restructured and designed as a fillable PDF. All attachment 2 forms have been revised and updated accordingly. With these revisions only one version of the template is necessary (no longer required to choose FDP or non-FDP), and the forms can be used for any of the agencies that have implemented the new Research Terms & Conditions. Forms can be accessed at [http://thefdp.org/Subawards\\_Forms.html](http://thefdp.org/Subawards_Forms.html)

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