Guidelines for Affiliation Relationships

1. Guidelines for Approval
   a. Each proposed affiliate should have a sponsoring unit that will draft a rationale for the affiliation or other change in purpose or size of the affiliate (“Affiliation”). This rationale should include (i) a statement of the Affiliation’s purpose; (ii) an outline of strengths the Affiliation will bring to Emory for fulfillment of its academic, scholarly, service, or other missions; (iii) any budgetary considerations or space needs pertinent to the Affiliation; (iv) a history of any previous relationships Emory or the sponsoring unit has had with the affiliate; (v) a description of the ways in which the Affiliation with Emory will benefit the affiliate; and (vi) a statement that the sponsoring unit agrees to accept responsibility for any financial liability of the affiliate to Emory. The Affiliation must also benefit Emory in a unique or important way. The Affiliation is an important contractual relationship for Emory and should not be entered into solely as a convenience or cost saving measure for the affiliate.
   b. The sponsoring unit shall submit the rationale for the Affiliation to the unit’s respective dean or division head for approval; to the Office of the General Counsel to develop a contract; and to the Offices of Quality and Risk, Human Resources and Finance, for an assessment of operational risk and necessary insurance coverage, before submission of the proposed affiliation to the Ways and Means Committee (“WAM”), or its delegate, for approval.
   c. Once an affiliation is approved by WAM, or its delegate, the sponsoring unit must assign a faculty or staff member to assist the affiliate in understanding and working within the Emory systems and policies of human resources, payroll, accounting, procurement, information technology, and governance, to the extent necessary for a smooth and effective relationship between the affiliate and Emory. Responsibility for the effectiveness of the relationship will rest jointly with the affiliate and the sponsoring unit.

2. Material Agreement
   Emory will establish with each affiliate a mutually agreeable contract for services to be provided by Emory. These services may include supporting information technology needs, providing space for offices, maintaining payroll, assisting in recruitment of staff, processing financial transactions (such as, but not limited to, billing and accounts receivable, procurement of goods and accounts payable, and expense reimbursements), or other services specific to the needs of the affiliating organization. The affiliate must agree to abide by all applicable Emory policies. The affiliate must also acknowledge that the affiliate is ultimately responsible for determining that all financial transactions processed by Emory on the affiliate’s behalf are reasonable and have a valid business purpose. Emory will allocate a charge equal to a percentage, as determined from time to time, of the affiliate’s annual operations budget to pay for indirect expenses and services. Such charge will be determined by the University Budget Office and approved by WAM or its delegate.
3. **Periodic Review**

Affiliate relationships should be reviewed at least once every five years to determine if they should be continued or modified. Elements of the review should include the cost/benefit to Emory and a statement of major accomplishments (including the impact of such accomplishments on Emory and whether they contribute to Emory’s mission). The sponsoring unit is responsible for providing the review document to WAM, or its delegate. The review results will be communicated by WAM or its delegate to the sponsoring unit for subsequent distribution to the affiliate.