

ORS Legal Review

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DALHOUSIE
UNIVERSITY



Purposes of Legal Review

1. Establish a clear and accurate record of rights and duties of all parties;
2. Ensure compliance with regulatory requirements and university's policies;
3. Ensure proper understanding of parties obligations;



Documents that do not require legal review

At the Pre-award stage

- a. Templated documents/agreements
- b. No-Cost extensions (NCEs) that only require a change in the end date

Post Award Stage

- a. Templated documents/Agreements
- b. Transfer of Funds letters and Incoming Tri-Agency funds below \$250,000



How to initiate(or submit document for) legal review

- Filling and submission ROMEO Checklist
- Assignment to the Legal Advisor or Contract Specialist



Process of legal review

- Understanding the needs;
- Checking to ensure/highlight the required approvals (ethics, indigenous etc);
- Drafting appropriate documentation;



Process of Legal Review

- ❖ Reviewing drafts to suggest edits to clarify or alter unfavourable terms;
- ❖ Negotiating proposed edits (conference calls or email exchanges);
- ❖ Altering agreements (amendments, NCEs)
- ❖ Finalising drafts;



Signature Policy and signing process

- ✓ Institutional signatories
- ✓ Delegation
- ✓ recommending for signing.



Questions???



Thank You!