

EXAMPLE

PARTNERSHIP UNDERSTANDING BETWEEN OFFICE OF FINANCIAL AID AND TITLE IX TEAM

Purpose

This Partnership Understanding ("PU") is designed to coordinate and implement a clear, consistent and trauma-informed response to reports and incidents of sexual discrimination and harassment as well as, where applicable, pregnancy and related conditions. This Understanding also identifies the potentially involved community members served by each partner, including employees, students, guests, and third-party vendors of [institution].

Responsibilities/Jurisdiction

[Institution's] Title IX team has exclusive responsibility for responding to reports that allege sex-based misconduct and violence occurring on campus or educational programs and/or activities and facilities that are owned or occupied by the institution. Under federal Title IX regulations, the Title IX Coordinator also is charged with response to disclosures of pregnancy and related conditions.

The Office of Financial Aid has exclusive responsibility for the institution's compliance with federal financial aid law and institutional policies on awarding, distribution and monitoring of all financial aid.

Points of Contact

Primary contacts associated with this Partnership Understanding and their work modalities (e.g., on-campus, hybrid, remote) are:

- [Institution Contact (title/role rather than name) and Contact Information]
- [Financial Aid's Office Contact & Contact Information]

Shared Responsibilities between The Office of Financial Aid & Title IX Team

- Examples of things to talk through and make decision on
 - Determine point person to be primary liaison between the two teams
 - Set standards of notification and communication
 - Create a method for sharing protected/sensitive information about specific issues
 - Set expectations for urgency and timeliness in response by campus partners
 - Collaborate on responsive measures that will remediate the involved issue

- Keep appropriate records that document shared efforts
- Brainstorm annually about measures to improve topics of shared responsibility
- In accordance with applicable law, ensure the privacy of individuals involved in any report or communication
- Keep each other informed about current relevant trends and patterns
- Meet in person or virtually on an annual basis to discuss this document and make changes as needed to ensure appropriate response
- Cross-train on initial response protocols and investigation procedures, as well as training on the neurobiology of trauma, trauma-informed response, and culturally responsive practices
- Review and update this Partnership Understanding every two years

Responsibilities of The Office of Financial Aid

- Respond to the Title IX team with reasonable promptness when a student discloses sex-based misconduct including harassment, discrimination, or violence.
- Share information, in accordance with applicable law, with the Title IX Coordinator about specific disclosure, including notifying student prior to doing so that such report is mandated.
- Respond in a timely way to requests for accommodations from Title IX Coordinator, including removing financial aid holds and granting tuition relief when the Title IX team has concluded that such relief is appropriate.
- Share documentation of requested accommodation with the Title IX team for record-keeping purposes.
- Provide consultation with an identified student when requested by the Title IX team.

Responsibilities of [institution] Title IX Team

- Respond appropriately to reports of disclosures of sex-based misconduct from this partner.
- Acknowledge reports in a timely manner and ensure the reporting party recognizes the important role they have played.
- Provide training and follow-up for staff members who interact with documents where disclosures may take place.
- Give clear information about requested accommodations relative to financial aid holds, tuition waiver requests, and any other Title IX-based student accommodation request relative to a student's financial aid account.
- Collaborate with partner when questions or challenges relative to such requests arise.

Acknowledgement & Signatures

- Each Partner agrees to act in good faith relative to this Understanding.
- Amendments must be made in writing, signed and dated by the parties