

Instructions

1. Complete this form to request a "University Service Agreement" be issued to a non-contracted supplier.
 NOTE: This form only applies to "UNIV" funding. OSP does not require this process.
2. Acquire a written and detailed quote, proposal and/or technical information from supplier. These items must be dated within 30-days.
3. Please do not request any other documents, such as insurance, BWC, license/certification or Vendor Maintenance forms. Purchasing will collaborate with supplier and unit to acquire these documents upon approval of the Scope of Work by the central units.
4. Attach this completed form and other supporting documents (step #2) to the eRequest. Submit for approvals.
5. Please reference the "University Service Agreement FAQ" for additional information.

CFAES Unit and Primary Customer Contact Information

CFAES Unit/Department:		eRequest Number:	
Unit Contact Person:			
Unit Contact Phone:		Unit Contact Email:	

Non-Contracted Supplier Information

Supplier Name:			
Representative Name:			
Representative Phone:		Representative Email:	

Scope of Work: Describe, in detail, the work or project the service provider will perform for the University. The explanation should include technical details, equipment used, products and materials, etc. Attach additional sheets if needed.

Justification: Describe, in detail, why a University contracted supplier is unable to fulfill the Scope of Work. Attach additional sheets or documentation if needed.

Estimated Work Dates: Supplier is not permitted to begin work until this request has been reviewed and approved by designated central units, and, a "University Service Agreement" fully executed with supplier.

Estimated Start Date:		Estimated End Date:	
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What is a University Service Agreement?

A process that must occur *prior* to specific services performed by non-contracted suppliers. The process verifies the non-contracted supplier meets mandatory criteria (below). NOTE: This requirement only applies to "UNIV" funding (not OSP funding). Process steps listed at the bottom of this page.

- **Insurance Coverage:** Meets both University and State of Ohio financial levels.
- **Licensing/Certification:** Supplier holds required licenses/certifications per scope of work.
- **State of Laws:** Supplier's business practices operate within State of Ohio laws.

Does the process apply to existing University-wide contracted vendors (e.g. Martin Painting)?

No. The University selects contracted service suppliers thru the bid process. All bid awardees are vetted for above mandatory criteria prior to a University-wide contract issued.

Who in the University enforces the Service Agreement process?

University Leadership directed several central units to collaborate for collective oversight and enforcement. Central units include Legal Affairs, Risk Management, FDC/FOD, EHS, etc. Purchasing facilitates the process on behalf of the central units required to review the scope of work applicable to area of oversight.

What is a "scope of work"?

A written detailed explanation of each individual service-based need. It should include any technical information and supplier documentation (quote, proposal, terms/conditions, contract, etc.).

What factors determine if a University Service Agreement is required?

If "yes" to any of following:

- Supplier will be on University property. "University property" includes owned, rented or controlled premises.
- Service is for University facilities, mechanicals, buildings, structures and/or grounds.
- Classified as "skilled trades" (e.g. plumber, electrician, HVAC, welding, etc.).

What if the above is unclear for a specific service need?

Some circumstances may be situational and not easily clarified until consultation with central units. Best practice is to proactively contact the CFAES Service Center for assistance. Central units may review the scope of work, request information and/or supplier documentation (quote, proposal, terms/conditions, contract, etc.).

Does this process apply to all supplier types (corporations, LLCs, independent contractors)?

Yes. All service-based suppliers must be reviewed for applicability of a University Service Agreement.

If the same non-contracted supplier is used for multiple scopes of work can the same Service Agreement apply?

No. The University requires each individual repair/service have a separate Service Agreement issued.

What if emergency repair is needed?

The University recognizes emergencies occur that can result in disruption to daily operations. If an emergency occurs it's acceptable to proceed in bypassing the Service Agreement process for prompt repair. The University's expectation is appropriate judgement will be exercised when assessing degree of emergency or impact to daily operations. Efforts should be made to have the emergency repair paid on a Purchase Order (PO). The University prefers PCard not be used. Emergency-based repairs must be documented by an approved "Policy Exception Form" attached to the eRequest.

University Service Agreement Process		
1	CFAES Unit	Enters eRequest and attaches: <ul style="list-style-type: none"> • A completed "CFAES Service Agreement Request" form. • Supplier documents (quote, proposal, terms/conditions, contract, etc.). Documents must be dated within 30-days. • Please <i>do not</i> request any other documents, including insurance, BWC, license/certification and Vendor Maintenance forms. Purchasing will collaborate with supplier and unit to acquire these documents upon approval by central units.
2	Service Center	Reviews request and attachments and forwards to Purchasing.
3	Purchasing	Reviews request and attachments and forwards to applicable University central units.
4	Central Units	Reviews request and if approved guides Purchasing on supplier requirements.
5	Purchasing & CFAES Unit	Purchasing collaborates with unit to have supplier provide all required documentation, including insurance, BWC, licenses/certifications and Vendor Maintenance forms.
6	Legal Affairs	Issues a contract to supplier for signature and return to the University.
7	Purchasing	Once contract returned Informs CFAES Service Center to proceed with issuing a Purchase Order (PCard not preferred).