

University Services Agreements

Procurement and Contracts

Contract Components

- ▶ Who are we paying?
- ▶ What are we paying for?
- ▶ How are we paying?
- ▶ When do we pay?
- ▶ Did we get what we paid for?



AGENDA

- Introductions
- Definitions
- Commitment to Diversity
- Ethics in Contracting
- Previous Processes
- New Process
- Q & A

Presenters

- **Phil Crigger, Agreements and Contracts Coordinator**
- **Kimberly Dulaney, Executive Director of Strategic Sourcing**
- **Teresa Anders, Associate Director of Procurement and Contracts**
- **Brad Foster, Accounts Payable Supervisor**

Terms and Vocabulary

- Contract – A legally binding and enforceable promise between two or more competent parties, 2-signatures
- Contractor/Vendor – Who we awarded the “contract” to
- Performance Agreement/Services Agreement-a 2-party contract
- Contract Administrator – Person identified as the “owner” of the contract (*or their designee*)
- Contract Officer – Buyer in Procurement who facilitated the contract

Terms and Vocabulary (con't)

- COVA W-9 – Commonwealth's W-9 form
- Independent Contractor Checklist
- PR-Purchase Requisition
- PO-eVA Purchase Order
- eVA-Electronic Virginia Procurement Portal

Commitment to Diversity

- Revised Procurement Manual
- Direct Awards
- Certified SWaM Businesses
- Aspirational Goal of 42%



Ethics In Contracts

- Integrity
- Impartiality
- Confidentiality
- Positive Vendor Relations
- Conflict of Interest



CHAPTER 2- Procurement Manual

[https://www.radford.edu/content/dam/departments/administrative/purchasing/Procedures%20Manual/PROCUREMENT MANUAL 7-1-2020.pdf](https://www.radford.edu/content/dam/departments/administrative/purchasing/Procedures%20Manual/PROCUREMENT%20MANUAL%207-1-2020.pdf)

Federal Contracts and Grants

<https://www.radford.edu/content/research-compliance/home/COI.html>

How Did We Get Here?

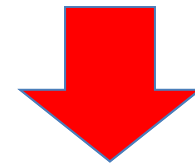


Previous Processes

Performance Agreements
Skilled Services Agreements
Speaker Agreements
Consulting Services
Events on Campus
Freelance Agreements
Dot...Dot...Dot



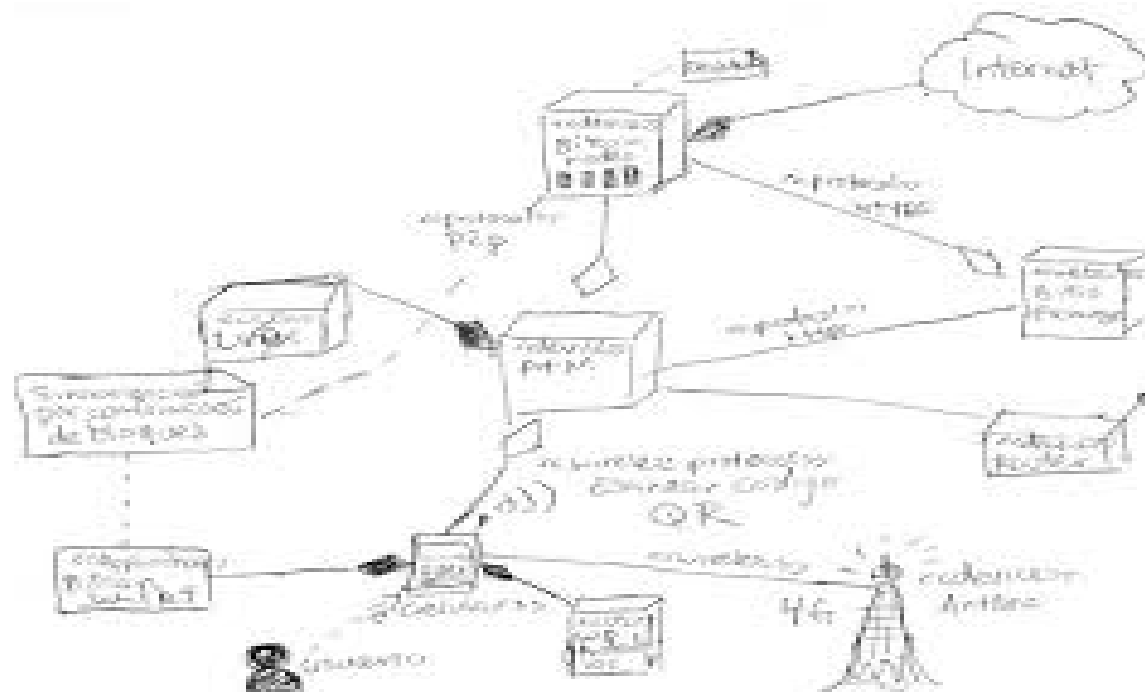
- Department fills out appropriate form and sends to Phil
- Phil reviews form and agreement only for terms and conditions
- Phil logs into Excel spreadsheet
- Department sends form back to vendor
- Vendor signs and sends back to Department (hopefully)
- Department sends signed agreement back to Phil (hopefully)
- Department enters PR (hopefully)
- Department obtains COVA W-9 and completes Independent Contractor Checklist (hopefully)



- PR goes through approval flow
- If all is okay, Phil catches PR and attaches agreement
- If any approvals are denied, process stops
- AP holds a copy of agreement and waits for email from Phil approving payment
- PR is converted to PO
- PO sent to vendor by eVA in usual manner
- Department emails AP to ask when vendor will be paid
- After AP confirms PO, vendor is paid



What did we do?



Two Processes

- Procurement – eVA fees apply-Submitted with PR
 - Consultants
 - Events
 - Independent Contractors
- Direct Pay/eVA fees exempt-Submitted with PR
 - Performers
 - Speakers
 - Writers/Adjudicators
 - Game Officials
 - Writers
 - Musicians



Types of Contracts

- Consultant – Procurement
- University Services Agreement– Procurement
- Performance Agreement-Procurement
- Independent Contractor– Procurement
- Events-Procurement

All require a PO-Receiving-Invoice

Purchase Orders

- Issue **before** purchase/service is acquired
- Issue at start of new project
- Protects you and contractor
 - Secures product and pricing and approvals
- Required by policy and procedures
 - Non-compliance may result in non-payment of invoice

Three Agreements = One Form



SERVICES AGREEMENT

- Used for Performing Artists, Speakers and other services **LESS THAN \$10,000** when the vendor **DOES NOT** provide a contract/proposal for signature.
- Independent Contractor Form required
- COVA W-9 required
- Not used for Honoria

Request for Taxpayer Identification Number and Certification



Social Security Number (SSN)

Employer Identification Number (EIN)

Please select the appropriate Taxpayer Identification Number (EIN or SSN) type and enter your 9 digit ID number. The EIN or SSN provided must match the name given on the "Legal Name" line to avoid backup withholding. If you do not have a Tax ID number, please reference "Specific Instructions - Section 1." If the account is in more than one name, provide the name of the individual who is recognized with the IRS as the responsible party.

Dunn & Bradstreet Universal Numbering System (DUNS) (see instructions)

Legal Name:

Business Name:

Section 1 - Taxpayer Identification

Entity Type	Entity Classification	Exemptions (see instructions)
<input type="checkbox"/> Individual <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Trust <input type="checkbox"/> Estate <input type="checkbox"/> Government <input type="checkbox"/> Non-Profit	<input type="checkbox"/> Professional Services <input type="checkbox"/> Political Subdivision <input type="checkbox"/> Real Estate Agent <input type="checkbox"/> VA Local Government <input type="checkbox"/> Federal Government <input type="checkbox"/> VA State Agency	<input type="checkbox"/> Corporation <input type="checkbox"/> S-Corporation <input type="checkbox"/> C-Corporation <input type="checkbox"/> Disregarded Entity <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation
	<input type="checkbox"/> Medical Services <input type="checkbox"/> Legal Services <input type="checkbox"/> Joint Venture <input type="checkbox"/> Tax Exempt Organization <input type="checkbox"/> OTH Government <input type="checkbox"/> Other	Exempt payee code (if any): <input style="width: 100%;" type="text"/> (from backup withholding) <input style="width: 100%;" type="text"/> Exemption from FATCA reporting code (if any): <input style="width: 100%;" type="text"/>

Home

COVID-19 Guidance

Contact Us



Information for Departments



University Procurement and Contracts Policy

Charter Bus Information

Contracts

eVA Resources

Event Staffing Services

Lab Supplies

IT Procurement

Office Supplies

Process Guidance

Procurement Procedures

Information for Vendors

Training Opportunities

Process Guidance

Please review these topics for answers on specific Procurement or Contract processes. For questions on topics not listed or for further guidance contact the Office of Procurement & Contracts at (540)831-5419.

[Consulting Services](#)

[Furniture Purchase Procedures](#)

[Temporary Employment Agency Services](#)

[University Services Agreement Process Guidance](#)

[University Services Agreement Workflow Guide](#)



- Department completes Services Agreement and sends to vendor for signature
- Attach signed Services Agreement to PR
 - **Any negotiations to terms must be initialed by vendor, department and Procurement and Contracts**
 - Attach Independent Contractor Certification
 - Use PO Category X02 for speakers, musicians, etc. All others use R01
 - Use Expenditure Account Code 712680
- PR goes through approval flow process in eVA
- Once approved, PO goes to Vendor

- Once work is completed, receive PO
- Vendor sends invoice to AP
- Please see guidance for prepayments/performance day payments

A Word About “Consultants”

- Up to \$50,000
- Must submit a proposal with pricing that is auditable (What are we paying for?)
- Use Commodity Code 91800
- Individual-Independent Contractor Checklist
- No signatures on proposal
- All Terms and Conditions submitted in proposal must be reviewed by Procurement and Contracts
- Refer to Process Guidance for Consultants

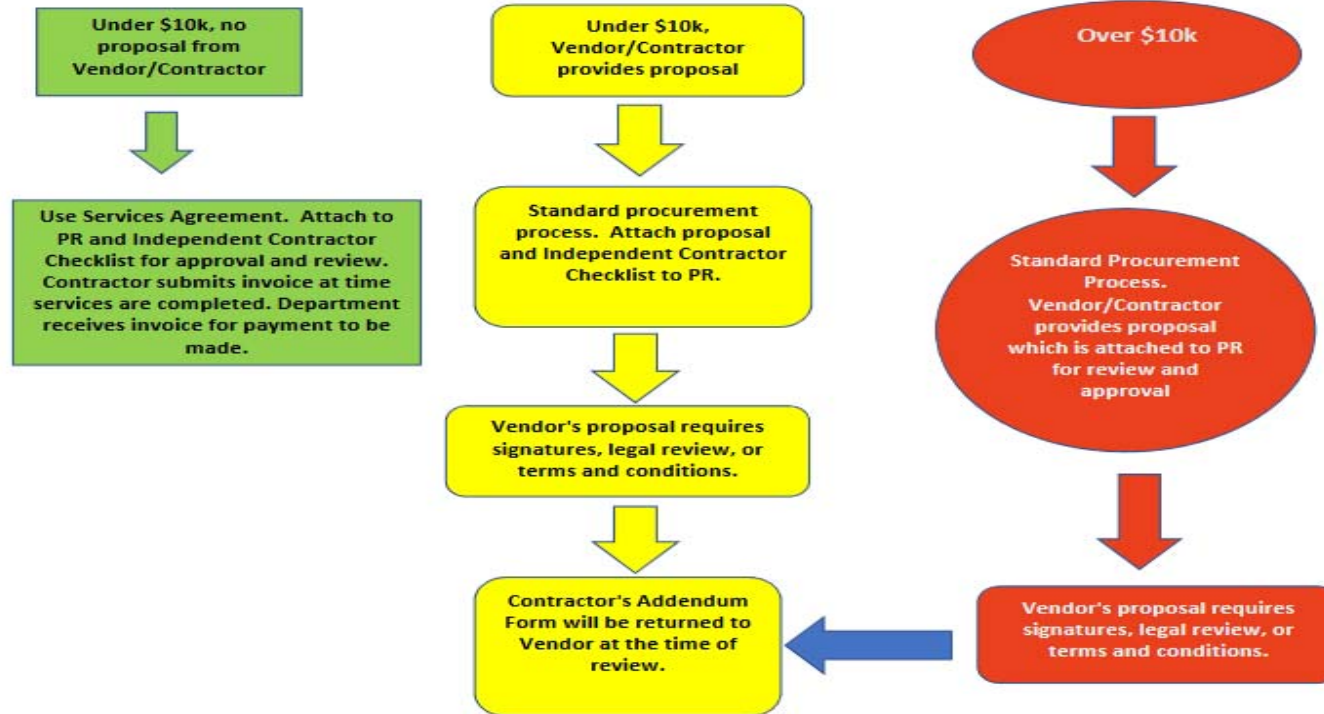
Process Guidance

- Procurement and Contracts>
- Information for Departments>
- Process Guidance

[Services Agreement Process Guidance](#)

[Consulting Services Process Guidance](#)

University Services Agreement Workflow



Over \$10k, or Vendor provides Proposal

- Standard Procurement Process
- Attach proposal to PR in advance of ordering
- Procurement and Contracts will review proposal and terms, approvals will flow through eVA
- No Services Agreement Form needed
- Invoice is paid in accordance with prompt pay processes



Q and A

Thank You

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