



Service Partnership Agreements – Cover Sheet

By and Between

[Responsibility Unit]

And

Finance and Administration Shared Services

Effective Date: July 1, 2017 – June 30, 2018

This Agreement represents a Service Partner Agreement (“SPA”) between Finance and Administration Shared Services (FASS) and [Responsibility Unit] for the provisioning of administrative support to enhance and support departmental activities as outlined below. The elements of the service covered by this agreement include:

- Budget and Finance
- Human Resources
- Information Technology
- Purchasing and Accounts Payable

Agreement Period

This Agreement remains valid until terminated by either party or superseded by a revised agreement mutually endorsed by the stakeholders. This Agreement is valid from the Effective Date outlined herein. This Agreement will be reviewed at a minimum once per fiscal year; however, in lieu of a review during any period specified, the current Agreement will remain in effect. The agreement may be terminated by either party with 180 day notice. FASS agrees to take whatever means are necessary to fully transition functions back to the [Responsibility Unit] or to whomever it designates prior to the termination date.

Approval

(By signing below, all Approvers agree to all terms and conditions outlined in this Agreement.)

Jon Marchetta
Director of Finance and Administration Shared Services

[Department AVP]
[Department AVP Title]

Signature

Signature

Date

Date



Finance and Budget Service Partner Agreement

By and Between

[Responsibility Unit]

And

Finance and Administration Shared Services

Introduction

This Agreement represents a Service Partner Agreement (“SPA”) between Finance and Administration Shared Services (FASS) and [Responsibility Unit] for the provisioning of Budgeting and Financial support to enhance and support departmental activities as outlined below. This document describes the services provided, financial impact (if any), processes for receiving support services and making requests, and responsibilities of the [Responsibility Unit] and FASS. The elements of the service covered by this agreement include

- 1.0 Budget
- 2.0 Rate Development and Rate Maintenance
- 3.0 Memorandum of Understanding Management
- 4.0 Reconciliations and Financial Adjustment
- 5.0 Forecasting and Reporting
- 6.0 Accounting and Journal Vouchers
- 7.0 Billing and Accounts Receivable

Cost

No charge to responsibility unit for services outlined in this agreement, unless otherwise stated.

Service Exceptions: Finance and Administration Shared Services and [Responsibility unit] mutually agree the following services are excluded from this agreement:

None

Availability Restrictions

Normal University Business Hours, Monday – Friday, 7:30am-5:00pm

Request Prioritization

Priority Code	Description	Target Response Time
1	Critical	2 Hours
2	High	8 Hours
3	Medium	48 Hours
4	Low	5 Days
5	Very Low	30 days



For the purposes of this document, a “request” is any element of the service that is reported by an end-user or needed. The following details the process utilized by VPFA Shared Services to prioritize incidents. Note the prioritization is determined by VPFA Shared Services in consultation with the user submitting the request.

Departmental Responsibilities

- Prepare and submit all required information in a timely and accurate manner
- Familiarize staff with VPFA Shared Services accounting, budget and related fiscal procedures and standards
- Submit required information using forms and format provided by VPFA Shared Services.
- Partner in communicating to personnel that delivery of a service is based on the following SPA agreement and institutional strategic priority.

Service Details

The following describes the services provided to [Responsibility Unit] by FASS Budget and Finance. A summary is provided with details below:

- 1.0 Budget and Resource Planning Support
 - 1.1 Budget Methodology
 - 1.2 Resource Planning
 - 1.3 Long Term and Capital Planning
- 2.0 Rate Development
- 3.0 Memorandum of Understanding Management
- 4.0 Accounting and Financial Support
- 5.0 Forecasting and Reporting
- 6.0 Billing and Accounts Receivable

1.0 Budget

1.1 Budget Methodology

Services Provided	Success Measures
<ul style="list-style-type: none"> • In conjunction with department, establish annual financial plan • Manage Fiscal Year close and open activities • Indirect Cost Recovery (ICC) allocation management • Pooled cost analysis and allocation, for such things as training and equipment renewal • Recurring allocations analysis • Salary & benefits analysis & forecasting • Strategic initiatives allocation management and request support • Provide data entry for all budgetary data into the UO budget system • Develop departmental budget training and operational budget guidance documents 	<p>95% response to outlined service timelines</p>



1.2 Resource Planning

Services Provided	Success Measures
<ul style="list-style-type: none"> Oversee and provide direct support for special analytical studies and presentations Identify resource and management policy trends and prepare reports and recommendations Advise departmental partners on financial asset and management issues Determine planning strategies to pursue new resources for the department Coordinate restructuring strategies for existing departmental financial resources 	NPS ₁ of >50% over at least 10 customer interactions per quarter.

1.3 Long Term Planning and Operational Capital Asset Planning

Services Provided	Success Measures
<ul style="list-style-type: none"> Provide financial scenario analysis support, including best practice recommendations Direct and conduct financial and resource related policy analysis Develop and effectively recommend departmental resource priorities Coordinate planning of department managed provisions, and capital programs consistent with institutional resource priorities. 	NPS of >50% over at least 10 customer interactions per quarter.

2.0 Rate Development

Services Provided	Success Measures
<ul style="list-style-type: none"> Rate policy development and implementation Annual rate review Recharge or internal rate review and approvals Annual rate report Rate audits/internal quality reviews External and internal sales review, per department specifications Rate use training coordination and technical support 	NPS of >50% over at least 10 customer interactions per quarter.

3.0 Informal Contract Support

Services Provided	Success Measures
<ul style="list-style-type: none"> Provide Memorandum of Understanding (MOU), or informal contract management and organization Periodic review of established MOU’s, annually or per established agreement review period. 	95% response to outlined service timelines

¹ NPS – Net Promoter Score. This is the percentage of promoters less the percentage detractors, derived by asking customers who have used our service “On a scale of 0 to 10, how satisfied are you with our service?” and measuring their responses. A full discussion may be found here: <https://www.netpromoter.com/know/>



<ul style="list-style-type: none"> Guidance and consultation on establishment of new internal or external agreements, in collaboration with UO Purchasing and Contracting Services and/or the UO General Counsel as appropriate. 	
---	--

4.0 Accounting and Financial support

Services Provided	Success Measures
<ul style="list-style-type: none"> Establish and maintain an internal control structure for partner departments to ensure compliance with state, federal and departmental policies and procedures Coordinate annual spending plan process Maintain master schedule of fund availability Set up new projects or appropriations Manage annual departmental carryforward process and allocation Provide reconciliation services for appropriate accounts and funds 	NPS of >50% over at least 10 customer interactions per quarter.

5.0 Forecasting and Reporting

Services Provided	Success Measures
<ul style="list-style-type: none"> Prepare monthly unit budgetary reports Prepare monthly cash flow reports as needed or when requested Provide cost analysis for departmental shadow systems Monitor accounts for emerging issues, statutory compliance, accuracy and cash flow needs Manage and report on project funding as requested by department Provide ad-hoc financial reports as requested 	95% adherence to published reporting schedules

6.0 Billing and Account Receivables

Services Provided	Success Measures
<ul style="list-style-type: none"> Provide internal billing services for departmental provided services Provide guidance and administrative support for departmental account receivables (AR) activities Provide event billing support via approved departmental program or tools 	95% response to outlined service timelines



Human Resources Service Partnership Agreement

By and Between
[Responsibility Unit]

And

Finance and Administration Shared Services

Introduction

This Agreement represents a Service Partnership Agreement (“SPA”) between Finance and Administration Shared Services (FASS) and [Responsibility Unit] for the provisioning of Human Resource support to enhance and support departmental activities as outlined below. This document describes the services provided, financial impact (if any), processes for receiving support services and making requests, and responsibilities of the [Responsibility Unit] and FASS. The elements of the service covered by this agreement include:

- Recruitment & Staffing
- Employee and Labor Relations
- Compensation and Payroll Administration
- Organizational Development and Training
- Workforce Planning

Cost

No charge to responsibility unit for services outlined in this agreement, unless otherwise stated.

Service Exceptions: Finance and Administration Shared Services and [Responsibility unit] mutually agree the following services are excluded from this agreement:

None

Availability Restrictions

Normal University Business Hours, Monday – Friday, 6:30am-5:00pm. Specific requests for swing shift or night shift issues are accommodated.

Request Prioritization

All requests are responded to within 24 hours.

Departmental Responsibilities

Department responsibilities and/or requirements in support of this Agreement include:

- Adherence to all applicable University, Human Resources and VPFA Shared Service policies, processes and procedures.



- Appropriate request prioritization as outlined in this document and in cooperation with VPFA Shared Services.
- Maintenance of all department specific documentation.
- Reasonable availability of Department representative when resolving an issue or request.
- Timely response to requests for clarification of information and request details and priorities.
- Submit required information using forms and format provided by VPFA Shared Services.

Service Details

The following describes the services provided to [Responsibility Unit] by FASS HR. A summary is provided with details below:

- 1.0 Recruitment and Staffing
 - 1.1 Recruiting
 - 1.2 Onboarding
- 2.0 Employee and Labor Relations
 - 2.1 Performance Assessment Process
 - 2.2 Retention and Recognition
 - 2.3 Workplace Environment Analysis and Supervisor Support
 - 2.4 Investigations, Grievances, Dispute Resolution
 - 2.5 Discipline
 - 2.6 Employee Separation
 - 2.7 Leave of Absence
- 3.0 Compensation and Payroll Administration
 - 3.1 Pay Program Administration
 - 3.2 Payroll Processing and Time Entry
- 4.0 Organization Development and Training
 - 4.1 Staff Engagement
 - 4.2 Training Program Coordination
 - 4.3 Training Consulting
- 5.0 Workforce Planning
 - 5.1 Consultation and Data Reporting
 - 5.2 Position Inventory and Org Chart Management

1.0 Recruitment

1.1 Recruiting

Services Provided	Success Measures
<ul style="list-style-type: none"> • Work in concert with units to consult with, advise, provide framework and direction in the recruitment process; inclusive of managing all recruitments within the HRIS system • Review and approve budgetary allocation for posting type • Execute marketing including: advertising and posting plan • Consult with and advise Hiring Supervisor initiating recruitment of appropriate committee composition; which includes a member of FASS-HR being a non-scoring member of all committees • Serve as primary departmental contact for all recruitments for both applicants and units • Act as consultant to department management and hiring committees with regard to UO standards related to affirmative action, recruitment of candidates, retention and work group culture 	<p>90% recruitment completion within 90 days (classified) and 120 (unclassified) from requisition initiation.</p>



<ul style="list-style-type: none"> • Consult on strategies for specific hiring needs, including recommending recruitment methods targeted to specific groups of candidates • Assist department leadership in evaluating effectiveness of recruitment techniques and strategies • Provide initial screening services of applicant pools • During employee development consultation, maintain awareness of possible internal applicants to refer to open positions • Provide reference checking services; may include verifying work history, education, PSV, if requested/required. Expanded, specialized background checks are currently not provided. • Coordinate background screenings and any other required pre-employment testing required per position and via UO Standards • Review proposed offers and coordinate with the HR Compensation and Classification unit for both internal and external equity in conjunction with the HRIS recruitment system • In conjunction with hiring supervisor, make tentative offer and ensure contingencies are met before final offer is accepted • Process and route paperwork/electronic paperwork for appropriate UO review and signature • Finalize tentative offer and start date • Communicate new hire information to department and department financial professionals² 	
---	--

1.2 Onboarding

Services Provided	Success Measures
<ul style="list-style-type: none"> • Initiate departmental onboarding & orientation checklists, including: cell stipends, computer access, keys, ID cards, professional standards, relocation expense reimbursement, and telecommunications in conjunction with HRIS • Ensure employee is enrolled in UO Benefits Orientation and the UO New Employee Orientation (NEO) as well as any other university wide new employee activities • Send required notifications including welcome letter related to onboarding activities to new employee. • Coordinate any additional requirements (fingerprinting, credentialing) with HR, departments or outside firms. • Ensure I-9 is completed for all hires in accordance to legal requirements • Ensure new hire paperwork is completed within 3 days of hire • Provide copy of job description to supervisor/manager and request the information be provided to the employee along with behavior competencies associated with the position. • Ensure HRIS system is updated with current position information • Collaborate with and advise the department on a new employee onboarding plan. Coordinate initial meetings with supervisors and initial 4 week onboarding plan.² 	<p>90% recruitment completion within 90 days (classified) and 120 (unclassified) from requisition initiation.</p>

2.0 Employee and Labor Relations

2.1 Performance Assessment Process

Services Provided	Success Measures
-------------------	------------------

²Financial professional may be part of FASS



<ul style="list-style-type: none"> • Serve as the office of record for departmental recruitment files and be responsible for transferring recruitment documentation to UO HR offices of record • Communicate performance evaluations, requirements with department managers for both represented and non-represented staff. • Ensure managerial completion of all required performance evaluation material in a timely manner. • Collect evaluations, review content as requested, input into HR system, and communicate any changes required to supervisor and serve as department office of record. • Consult with managers/supervisors or employees to resolve performance based disagreements, providing coaching and feedback • Consult with managers/supervisors in development of written performance standards and crafting constructive feedback • Assist supervisors/managers to constructively coach and focus attention on key aspects of employee behavior 	<p>NPS³ of >50% over at least 10 customer interactions per quarter.</p>
--	---

2.2 Retention and Recognition

Services Provided	Success Measures
<ul style="list-style-type: none"> • Develop retention strategies which align workforce with departmental objectives • Advise department leadership on appropriate recognition strategies, in line with UO standards and collective bargaining agreements. • Coordinate opportunities for staff to develop through mentoring, cross-training, internships, campus staff organizations, professional associations, committee and task force assignments, skill assessment programs, and advertising of job opportunities. • Advise department on opportunities to promote recognition efforts and strategies • Participate in departmental or leadership teams on various initiatives, including strategic planning, projects, program development, and staffing initiatives 	<p>NPS of >50% over at least 10 customer interactions per quarter.</p>

2.3 Workplace Environment Analysis and Supervisor Support

Services Provided	Success Measures
<ul style="list-style-type: none"> • Advise departmental leadership on resolutions to identified non-productive work practices. • Assist and troubleshoot with supervisors/managers/employees in finding additional Human Resources support when needed for various issues • In conjunction with central HR, advise managers on handling and responding to complex disability management issues in accordance with University, state and federal guidelines • In conjunction with central HR, advise managers on handling workers compensation injuries and claims in accordance with University, state and federal guidelines • In conjunction with UO Environmental Health and Safety, identify and advise on activities to accommodate or to minimize employee injury or worker’s compensation issues • Coach management on creating open communication environment • Advise management on strategies for increasing communication effectiveness • Monitor Departments for central HR standard compliance 	<p>NPS of >50% over at least 10 customer interactions per quarter.</p>

³ NPS – Net Promoter Score. This is the percentage of promoters less the percentage detractors, derived by asking customers who have used our service “On a scale of 0 to 10, how satisfied are you with our service?” and measuring their responses. A full discussion may be found here: <https://www.netpromoter.com/know/>



<ul style="list-style-type: none"> • Provide consultation to departmental leadership on central HR compliance best practices • Assure departmental practices are aligned with University policies, practices and both state and federal labor legislations 	
--	--

2.4 Investigations, Grievances, Dispute Resolution

Services Provided	Success Measures
<p><i>*All services will be conducted in conjunction with Employee and Labor Relations in HR as needed.</i></p> <ul style="list-style-type: none"> • Serve as first point of contact for Collective Bargaining Agreement (CBA) consultation and interpretation. • Conduct impartial investigations which ensure preservation of confidentiality, sensitive materials and protection of both employee, managerial and University rights • Promote cohesive work units with climates of cooperation and collaborative problem solving by identifying and mediating minor disputes • Consult with departments towards achieving objective resolution • Prescribe plans to identify core issues and conduct follow up on recommended outcomes • Address workplace conflicts through appropriate steps or escalation • Conduct Weingarten meetings and track documentation of outcomes • Assess implications of grievances and corresponding impacts of recommended resolutions. Communicate and seek additional resources from Central HR, as appropriate. • Represent the University during grievances, contract disputes, arbitrations, state or federal investigation or external legal challenges 	NPS of >50% over at least 10 customer interactions per quarter.

2.5 Discipline

Services Provided	Success Measures
<p><i>*All services will be conducted in conjunction with Employee and Labor Relations in central HR as needed.</i></p> <ul style="list-style-type: none"> • Partner with supervisors/managers on disciplinary strategies for handling complex situations. • Conduct formal and informal meetings as required and follow through on resolutions. • Diagnose problems to determine what disciplinary action is appropriate • Assist department with documentation or disciplinary letters • Recommend standardization of disciplinary measures 	NPS of >50% over at least 10 customer interactions per quarter.

2.6 Employee Separation

Services Provided	Success Measures
<ul style="list-style-type: none"> • Ensure accuracy of department separation paperwork • Develop and maintain exit checklist and program for supported units. • Ensure Department follows exit⁴ checklist as needed • Invite all exiting employees to complete exit survey 	NPS of >50% over at least 10 customer

⁴ To be developed and maintained by FASS HR in conjunction with university initiatives



<ul style="list-style-type: none"> Coordinate or conduct exit interviews, as appropriate 	interactions per quarter.
---	---------------------------

2.7 Leave of Absence

Services Provided	Success Measures
<p><i>*All services will be conducted in conjunction with central Human Resources as needed.</i></p> <ul style="list-style-type: none"> Advise supervisors/managers/employees on appropriate UO procedures, forms and practices for Family Medical Leave Act (FMLA) and Oregon Family Leave Act (OFLA) as well as all other forms of leave or accommodation related to medical, education, personal, family member, extended sick, etc. Advise and educate managers and staff on all leaves (paid & unpaid) Work with Department to determine type of leave and next steps Ensure all Leave of Absence paperwork is completed with department assistance; inclusive of ensuring all time keeping paperwork is current and accurate Provide advice and guidance on legal issues associated with FMLA, in conjunction with central Human Resources Provide advice and guidance on legal issues associated with FMLA, in conjunction with central Human Resources 	NPS of >50% over at least 10 customer interactions per quarter.

3.0 Compensation and Payroll Administration

3.1 Pay Program Administration

Services Provided	Success Measures
<ul style="list-style-type: none"> Serve as the departmental advocate for requests for equity reviews, reclassifications, and merit increases. This includes appropriate analysis by reviewing, in conjunction with central HR, job description, market titles, appropriate bench marks and UO salary guidelines. Partner with central HR on appropriate compensation issues Generate compensation and position adjustment forms (work out of class, temporary appointment, etc.) and supporting documentation to submit to central HR for processing Serve as departmental supervisor/manager point of contact. Assist with communication/clarification of salary program guidelines Provide training and updates on compensation-related policy, bargaining agreements interpretation and guidelines 	99% standard payroll delivery each month

3.2 Payroll Processing and Time Entry

Services Provided	Success Measures
<ul style="list-style-type: none"> Review, audit and approve time form submittals for employees from management and supervisors Ensure appropriate time approvals process is in place Enter time records into Banner for pay approval Track, verify and ensure accuracy of payment differentials, such as shift differential and overtime pay. Upload pay information into departmental systems for chargeback activities 	99% standard payroll delivery each month



<ul style="list-style-type: none"> Collaborate with managers and supervisors on payroll practices and tracking in compliance with DOL, bargaining agreements, etc. Enter labor time records into departmental tracking systems, as appropriate⁵ 	
--	--

4.0 Organization Development & Training

4.1 Staff Engagement

Services Provided	Success Measures
<ul style="list-style-type: none"> Initiate and complete an annual FASS service survey with participating departments Promote departmental staff activities and assist in cross-departmental engagement Provide consultation to departmental leadership in relation to staff engagement strategies 	NPS of >50% over at least 10 customer interactions per quarter.

4.2 Training Program Coordination

Services Provided	Success Measures
<ul style="list-style-type: none"> Provide coordination and sponsorship of departmental training programs; conduct in house training programs Maintain an employee development program in conjunction with the departmental required training pools. Provide an appropriate method of employee sponsorship and application for developmental training funds.⁶ Send out communication about programs/training Schedule training meetings Plan, manage and execute logistics for training programs including: facility selection, AV needs, and catering Provide administrative assistance to training events including: photo copying, document preparation, agendas/minutes Track and manage required position training certificates and certifications Develop tracking tools to meet the training needs of the various departments in a coordinated effort and in a fiscally responsible manner. Recommend resources for departmental management leadership development 	NPS of >50% over at least 10 customer interactions per quarter.

4.3 Training Consultation

Services Provided	Success Measures
<ul style="list-style-type: none"> Use performance consulting techniques to partner with leaders and staff to assess problems, identify root causes, and develop performance improvement strategies 	NPS of >50% over at least 10 customer

⁵ Labor entry is for department wide initiatives and approved methods. This does not include, for example, an individual supervisors' shadow tracking system.

⁶ Subject to departmental funding availability.



<ul style="list-style-type: none"> Work with other University resources, such as central HR, external consultants, etc., to align department based initiatives to organizational initiatives and implement improvement strategies 	interactions per quarter.
--	---------------------------

5.0 Workforce Planning

5.1 Consultation and Data Reporting

Services Provided	Success Measures
<ul style="list-style-type: none"> Generate workable solutions for staffing issues (Return to Work, FMLA, Census), such as temporary assignments, work out of class, contract temp workers, etc. Provide consultation services and/or coordinate external resources, in relation to workforce re-organizations and departmental transformations. In conjunction with central HR, approve all reduction in force activities and ensure they are conducted in accordance with UO collective bargaining agreements and any University Policies and guidelines Assist departments in workforce planning through review and evaluation of forecasted workforce projections and historical trends In Conjunction with FASS IT, provide effort reporting for metric and KPI analysis 	NPS of >50% over at least 10 customer interactions per quarter.

5.2 Position Inventory and Org Chart Management

Services Provided	Success Measures
<ul style="list-style-type: none"> Maintain departmental position inventories as requested In conjunction with FASS Finance, track funding availability to existing positions. Provide position control at both the department and individual unit level. Maintain and manage Department organizational charts 	NPS of >50% over at least 10 customer interactions per quarter.



Information Technology Service Partnership Agreement

By and Between

[Responsibility Unit]

And

Finance and Administration Shared Services

Introduction

This Agreement represents a Service Level Agreement (“SPA”) between Finance and Administration Shared Services (FASS) and [Responsibility Unit] for the provisioning of Information Technology (IT) support to enhance and support departmental activities as outlined below. This document describes the services provided, financial impact (if any), processes for receiving support services and making requests, and responsibilities of the [Responsibility Unit] and FASS. The elements of the service covered by this agreement include:

- Single-point-of-contact for reporting and resolution for all incidents and requests that involve supported services, including related contracts.
- Deskside and remote support for desktop-related incidents and requests.
- UO Network account and login support.
- UO Network wired and wireless local and remote connectivity.
- UO printer contract management.
- Desktop, laptop, tablet and portable device system support.
- Shared file server system access management, backup, recovery and data management best practices education.
- Support a standard software suite of productivity and collaboration tools⁷. Examples include:
 - Outlook Email and calendaring
 - Excel, Word, Visio, PowerPoint
 - All apps that are part of the University Office 365 agreement
 - ArcGIS client
 - Adobe and Bluebeam clients
- Relationship management for services provided by Central IS and other 3rd parties.
- Asset management for desktop, laptop, tablets and portable devices. This includes support for:
 - Inventory management and hardware refresh.
 - Specification and acquisition.
 - Break/fix support.
- Anti-virus and other security tools plus best practices education and training for end-users.

Service Exceptions: Finance and Administration Shared Services and [Responsibility unit] mutually agree the following services are excluded from this agreement:

None

⁷ See Appendix “B” for list of software we provide.



Cost

No charge to responsibility unit for services outlined in this agreement, unless otherwise stated.

Availability Restrictions

Standard [maintenance](#) periods as implemented by Central IS for services provided by Central IS. These include Email, Banner, Remote System Access and Shared File services.

During curtailment or closure of normal UO operations, VPFA SHARED SERVICES IT will continue to support those systems designated as mission critical UO systems only.

All systems require maintenance from time to time that render them unavailable. VPFA SHARED SERVICES will work with the Responsibility Unit to determine a recurring maintenance window that will minimize impact.

Desktop systems are patched, which requires a user-initiated reboot on Thursdays at 12PM.

Desktops systems are automatically rebooted once a week on Saturday at 6PM.

Priority 1 incidents may temporarily restrict VPFA Shared Services from meeting response times.

Request Prioritization

Please see Appendix "A" – Service Criticality and Appendix "C" – Incident Prioritization

Departmental Responsibilities

Department responsibilities and/or requirements in support of this Agreement include:

- Adherence to all applicable University, Central IS and VPFA Shared Services policies, processes and procedures.
- Appropriate incident and request prioritization as outlined in this document and in cooperation with VPFA Shared Services.
- Submissions via ticketing system of all service related requests and other special services with the IT organization
- Maintenance of all department specific documentation.
- Appropriate use of supported applications and hardware.
- Reasonable availability of Department representative when resolving a service related incident or request.
- Timely response to requests for clarification of incident and request details and priorities.
- VPFA Shared Services must be consulted prior to introducing new software or hardware into the environment. This is to ensure that we can adequately support the environment.

VPFA Shared Services responsibilities

VPFA Shared Services responsibilities and/or requirements in support of this Agreement include:

- Meeting response times associated with service related incidents.
- Test results that indicate backup and data recovery commitments are met.
- Generating quarterly reports on service levels for the Responsibility unit indicating KPI adherence, including ticket resolutions and continuing incidents.
- Training required staff on appropriate service support tools.
- Appropriate notification and coordination to the business unit for all scheduled maintenance.



- Facilitation of all service support activities involving incident, problem, change, release and configuration management, including related contracts.
- Maintain current contact and escalation information.
- Communication to all appropriate staff within [Responsibility Unit] regarding unit or University-wide incidents that may impact service availability.
- Represent the Responsibility Unit as the IT Subject Matter Experts in support of university wide technology initiatives.

Service Details

The following describes the services provided to [Responsibility Unit] by VPFA SHARED SERVICES IT. A summary is provided with details below:

- 6.0 Single-point-of-contact for reporting and resolution for all incidents and requests that involve supported services.
- 7.0 Deskside and remote support for all desktop-related incidents and requests.
- 8.0 UO Network account and login support.
- 9.0 UO Network wired and wireless local and remote connectivity
- 10.0 Desktop, laptop, tablet and portable device system support
- 11.0 Shared file server system access management, backup, recovery and education on data management best practices
- 12.0 Support for our standard suite of productivity and collaboration tools.
- 13.0 Relationship management for services provided by Central IS
- 14.0 Asset management for desktop, laptop, tablets and portable devices.
- 15.0 Anti-virus and other security tools plus best practice education and training for end-users.
- 16.0 Multi-function copier contract and device management.
- 17.0 Other services and applications.

1.0 Single-point-of-contact for reporting and resolution for all incidents and requests that involve supported services.

Services Provided	Success Measures
<p>This aspect of the service may be initiated by email to fassit@uoregon.edu, phone (541.346.2232) or in-person. For incidents that significantly impact [Responsibility Unit] mission and that need immediate attention, phone or in-person notification are preferred. All other incidents should be raised by ticket submission via email. During business hours, VPFA Shared Services commits to a 15 minute response to incidents or requests reported via phone and within 1 hour to incidents or requests reported via email. In many cases, delivery of this service, either for incidents or requests, will require interaction with Central IS, other campus service providers or external 3rd parties. Whenever this is required, VPFA Shared Services will initiate all requests and own the issue to resolution. Incidents and requests are tracked and managed using an internal Work Request tracking tool. Incidents and requests will be tracked according to requestor, service, type of issue, priority, requested due date and actual completion date. Services will be prioritized in order to provide.</p>	<p><i>[Outlined on page 9]</i></p>

8 VPFA Shared Services has the capability to expand service coverage outside normal business hours if needed.



2.0 Deskside and remote support for all desktop-related incidents and requests.

Services Provided	Success Measures
<p>Resolution of incidents and requests that require direct involvement of VPFA Shared Services technicians will be accomplished remotely using the <u>Bomgar Service</u> provided by Central IS or by a visit of the technician to the requestor’s location. Remote support will typically be used as it is the most efficient for all involved, but from time-to-time it will be necessary for a technician to do repairs directly on the machine. Certain end-users may prefer a face-to-face service interaction. We will strive to satisfy such desires, but unless the circumstances of the incident or request warrants a desk side visit, VPFA Shared Services will, at its own discretion and with prior communication with the requestor, deliver the service in a manner that provides the most efficient request resolution.</p>	<p><i>[Outlined on page 9]</i></p>

3.0 UO Network account and login support

Services Provided	Success Measures
<p>VPFA Shared Services will assist with new user network set-up plus any other changes to a user accounts as might be required. Examples would include creation and adding users to security groups to grant shared file server access, adding shared mailboxes, UO Directory information, etc. VPFA Shared Services will, in most cases, will be acting on behalf of [Responsibility Unit] while dealing directly with service provider, Central IS.</p>	<p><i>[Outlined on page 9]</i></p>

4.0 UO Network wired and wireless local and remote connectivity

Services Provided	Success Measures
<p>This includes workstation and telephone move requests that require jack activation/de-activation, private network access provisioning, VPN requests and other solutions that enable off-site access to network resources. To deliver this element of the service, VPFA Shared Services will, in most cases, will be acting on behalf of [Responsibility Unit] while dealing directly with service provider, Central IS.</p>	<p><i>[Outlined on page 9]</i></p>

5.0 Desktop, laptop, tablet and portable device system support

Services Provided	Success Measures
<p>For the desktop, laptop, tablet and university-owned hardware utilized by <i>[Responsibility Unit]</i>, operating system, productivity application installation, upgrade and patching are covered by this service. The service will be delivered professionally and in accordance with industry best practices. In most cases, upgrading and patching are done with automated tools with no user involvement required. There are times, however, that a technician visit</p>	<p><i>[Outlined on page 9]</i></p>



will be required. These will be treated as VPFA Shared Services -initiated requests on behalf of the end-user.	
--	--

6.0 Shared file server system access management, backup, recovery and education on data management best practices

Services Provided	Success Measures
It is not unusual for shared file servers to become cluttered, disorganized and unnavigable. VPFA Shared Services will provide analysis and recommendation on how to structure or re-structure shared file servers to keep the information contained in them accessible and secure. We will help identify critical data and work to construct a backup and recovery scheme that meets the goals and objectives of [Responsibility Unit]. VPFA Shared Services will also provide on-going consultation and training on best practices to meet the responsibility unit need.	<i>[Outlined on page 9]</i>

7.0 Support for our standard suite of productivity and collaboration tools

Services Provided	Success Measures
For the list of applications in Appendix B, VPFA Shared Services will maintain adequately patched and upgraded current supported versions on [Responsibility Unit] workstations as requested and approved by [Responsibility Unit] approval processes. Note that some applications require a licensing or support fee as indicated in the Appendix B.	<i>[Outlined on page 9]</i>

8.0 Relationship management for services provided by Central IS

Services Provided	Success Measures
Most IT-related service elements used by [Responsibility Unit] depend on the campus-wide services provided by Central IS. As part of this agreement, VPFA Shared Services will act as the broker, facilitator and source of escalation for all incidents and requests that require [Responsibility Unit] to interact with Central IS.	<i>[Outlined on page 9]</i>

9.0 Asset management for desktop, laptop, tablets and portable devices.

Services Provided	Success Measures
VPFA Shared Services will maintain a current electronic inventory, maintenance history and replacement schedule for the desktop, laptop, tablet and university-owned hardware	<i>[Outlined on page 9]</i>



utilized by [Responsibility Unit]. Included in this service element is asset acquisition according to PCS purchasing policies and asset-tagging and registration per University Property Control policies.	
--	--

10.0 Anti-virus and other security tools plus best practice education and training for end-users

Services Provided	Success Measures
McAfee is included in the standard system load for applicable supported devices. VPFA Shared Services will monitor systems and ensure that the Anti-virus is functioning at all times. Additionally, VPFA Shared Services will provide routine training for end-users regarding email, portable device and online browsing safe practices. Part of this practice involves IT review and vetting of suspected “bad” emails and suspect sites encountered by end-user.	<i>[Outlined on page 9]</i>

11.0 Copier contract and device management

Services Provided	Success Measures
The University has a contract with Xerox for providing printing devices and consumables replenishment at very reasonable costs. VPFA Shared Services will provision devices according to contract, set-up printing services infrastructure and configure client machines to print to that infrastructure. Additionally, VPFA Shared Services will coordinate repairs, billing configuration and other aspects of the UO printing services contract.	<i>[Outlined on page 9]</i>

12.0 Other service and applications

Services Provided	Success Measures
If the Responsibility Unit utilizes other line of business applications that supports its mission, VPFA Shared Services will, with an in-force agreement, provide support for the application at whatever level that the customer and VPFA Shared Services care to negotiate.	<i>[Outlined on page 9]</i>

Exclusions

- Systems and software not covered by this or other in-force SPA’s.
- Equipment and software obtained outside of this agreement.
- Equipment moved without prior notification of VPFA Shared Services.
- BANNER Finance and HR application and system support.
- IDR.



Drupal or other web hosting or development.

Network architecture and provisioning – these incidents and requests must go through NTS. VPFA Shared Services will broker conversations with NTS.

Installation and configuration of software and hardware that is otherwise available as a service offered by Central IS.

Operational Parameters

The following describes the operational parameters that affect the performance of the service provided by this SPA that govern the service delivery environment:

Number of End Users:	<i>[Range, within 5 FTE, call out student position support.]</i>
User Base Description:	<i>[User Base Description, software used, local or remote to main campus, mobility needs, criticality]</i>
Estimated Yearly FTE Increase:	<i>[Range, with check-points bi-annually]</i>
Desktop Hardware Inventory:	<i>[Brand/Model numbers, acquisition date and location]</i>
Laptop/Tablet/Portable Device Inventory:	<i>[Brand/Model numbers, acquisition date and owner]</i>
Shared File Server(s) and Devices:	<i>[Server specification, Backup mechanism and policy]</i>
Software used by [Responsibility Unit]:	<i>[Name, Website or other contact information if not found in Appendix B]</i>
Service Contracts currently in force:	<i>[Name, link to contract]</i>
VIP Users	<i>[Positions titled Director or above, specified critical positions]</i>

Service Assumptions

Assumptions related to in-scope services and/or components include:

Customer user base will remain within 5 FTE or 5% (whichever is greater) of current staff levels.

Funding for major upgrades and service contracts costs not defined in this agreement will be provided by the Responsibility unit and treated as a project outside the scope of this Agreement.

Changes to services will be communicated and documented to all stakeholders prior to implementation.

Service Level

Service is offered 8AM-5PM on the days the university is open for normal business.

Incident and Request Response commitment:

15 minutes if initiated by phone

1 hour if initiated by email

Incident Resolution commitment, see Appendix C for details:



Priority Code	Description	Target Resolution Time
1	Critical	2 Hours
2	High	8 Hours
3	Medium	24 Hours
4	Low	3 Days
5	Very Low	2 Weeks

Request resolution commitment:

By negotiation with customer, 90% to occur within 1 day of negotiated resolution date.

Desktop system availability:

No user will be without access to a computer for more than 2 hours.

Service Measurements

The following measurements will be established and maintained by the IT organization to ensure optimal service provision to the business unit:

Measurement	Definition	Performance Target
Ticket Response Time	Client response time for Application X for a sample of transactions executed in less than 10 seconds.	90% on-time response.
Incident Resolution time	VPFA Shared Services resolution times by Incident priority.	90% compliance within published resolution time.
Customer Satisfaction	Overall measure of customer satisfaction with this service across Incident and Requests.	NPS ₉ of >50% over at least 10 customer interactions per quarter.
Open Ticket Age	Average age of unresolved tickets relative to Incident Priority Class Target Resolution time. (Tickets past due /Tickets not yet due) *100	Less than 10% of unresolved tickets older than due date.

Service Level Reporting

The VPFA Shared Services will supply **[Responsibility Unit]** with the following reports on the intervals indicated:

⁹ NPS – Net Promoter Score. This is the percentage of promoters less the percentage detractors, derived by asking customers who have used our service “On a scale of 0 to 10, how satisfied are you with our service?” and measuring their responses. A full discussion may be found here: <https://www.netpromoter.com/know/>



Report Name	Interval	Distribution
Unresolved Tickets	Weekly	<i>Outlined by Responsibility unit</i>
Ticket Response Time	Quarterly	<i>Outlined by Responsibility unit</i>
Incident Response Time	Quarterly	<i>Outlined by Responsibility unit</i>
Customer Satisfaction	Quarterly	<i>Outlined by Responsibility unit</i>

Information Services Compliance

The University and/or Central Information Services will, from time to time, add, delete or otherwise change policies, rules, regulations and service levels that impact services and/or service levels provided under this SLA. We will, within a reasonable timeframe and with prior notice, adjust the Services we provide to conform to these changes. These changes may occur outside of the annual review process for this SLA. The SLA will be amended to reflect the service level change during the following review period.



Appendix “A” – Service Criticality

The criticality of the service is determined by [Responsibility Unit]. VPFA Shared Services provides multiple services to a broad set of customers and needs a mechanism to gauge their importance in relation to each other. The criticality designation thus helps determine the recovery sequence when outages occur that impact multiple services. If [Responsibility Unit] has multiple mission critical or business critical services, VPFA Shared Services will request that services within these categories be ranked.

The incident prioritization structure defined in Appendix “C” is not the same as service criticality as defined here. For example, it is possible to have an incident occur that has a Priority Class Code of 4 – Low for a mission critical service. For example, if [Responsibility Unit] has determined that email is a mission critical service and an incident is reported whereby one user cannot access a particular mailbox, that incident will still be treated as a 4 – Low with a 3 day target resolution time. If, however, it is reported that the entire service is unavailable and there is another service entirely unavailable that has a lower service criticality designation, the mission critical service will be brought back into service first.

The following describes a structure for determining service categories and corresponding criticality of services for [Responsibility Unit]:

Mission Critical

A mission critical service requires continuous availability. Breaks in service are intolerable and immediately and significantly damaging. Availability required at almost any price. Key characteristics of this type of service are:

- Generates revenue: customer of [Responsibility Unit] books orders through the service.
- External customers are direct users of the services.
- Underpins the service [Responsibility Unit] provides to its customers.

The typical impacts of a service outage are:

- Inability to conduct business as usual.
- Damaging for the [Responsibility Unit] commercial reputation and credibility.
- Long-term outage threatens financial harm.

An example of a mission critical service are the point-of-sale terminals for the Duck Store.

Business Critical

A business critical service requires continuous availability, though short breaks in service are not catastrophic. Availability required for effective business operation.

Key characteristics are:

- Indirectly affects supply of [Responsibility Unit] service to its customers.
- Supports customer-facing activities



The typical impacts of a service outage are:

- Inability to answer respond to customer queries at a help desk.
- Long-term outage can significantly reduce company cash flow

An example of a business critical service is email.

Business Operational

Contributing to efficient operations but out of direct line of service to customer.

Key characteristics of business operational:

- Internal users only

The typical impacts of a service outage are:

- Reduced efficiency and increased cost of operations

An example of a business operational service is web access.

Administrative Services

Services on the level of office productivity tools, required for business to operate. Failures are undesirable but do not affect customers and can be tolerated a little more. Cannot justify extreme additional expenses for higher availability.

Key characteristics:

- Internal users only

The typical impacts of a service outage are:

- Reduced individual performance and productivity

Examples of administrative services applications are desktop applications such as Microsoft Excel and Word.



Appendix “B” – List of standard supported desktop applications

Application	Standard?	Fee	Available in O365	Note
MS Outlook	Y	N	Y	Communication and Calendaring
MS Excel	Y	N	Y	Spreadsheet
MS Word	Y	N	Y	Word Processor
MS PowerPoint	Y	N	Y	Presentation tool
MS Visio	N	Y		Graphic design tool
MS Project	N	Y		Project Management
Bluebeam	N	Y		Design document mark-up
ArcGIS	N	Y		Client for UO GIS infrastructure
AutoDesk	N	Y		Construction Design Suite
7Zip	Y	N		Used for file archiving
Internet Explorer	Y	N		Web Browser
Firefox	Y	N		Web Browser
McAfee	Y	N		Virus protection
Pidgin	Y	N		Chat
Adobe Acrobat	Y	N		PDF reader
Adobe Creative Cloud	N	Y		Electronic content creation
Adobe Flash & Shockwave	Y	N		Animation display container
GoToMeeting client	Y	N		Online meeting client
WebEx client	Y	N		Online meeting client
LiveMeeting client	Y	N		Online meeting client
PDFCreator	Y	N		Create PDF documents
CD Burner	Y	N		Burn CD's
VLC	Y	N		Media player
Skype	Y	N		Online video conferencing



Appendix “C” – Incident Prioritization

For the purposes of this document, an “incident” is any element of the service that is reported by an end-user to be malfunctioning. The inability to send email, a PC that won’t boot or an attempt to navigate to a directly location that results in “access denied” are examples of incidents. The following details the process utilized by VPFA Shared Services to prioritize incidents. Note that Urgency and Impact, and thus prioritization, are determined by VPFA Shared Services in consultation with the user submitting the Incident.

The incident prioritization structure defined below is not the same as service criticality as defined in Appendix “A”. For example, it is possible to have an incident occur that has a Priority Class Code of 4 – Low for a mission critical service. For example, if [Responsibility Unit] has determined that email is a mission critical service and an incident is reported whereby one user cannot access a particular mailbox, that incident will still be treated as a 4 – Low with a 3 day target resolution time. If, however, it is reported that the entire service is unavailable and there is another service entirely unavailable that has a lower service criticality designation, the mission critical service will be brought back into service first.

Incident Urgency is a measure how quickly a resolution of the incident is required.

Category	Description
High (H)	The damage caused by the Incident increases rapidly. Work that cannot be completed by staff is highly time sensitive. A minor Incident can be prevented from becoming a major Incident by acting immediately. Several users with VIP status are affected.
Medium (M)	The damage caused by the Incident increases considerably over time. A single user with VIP status is affected.
Low (L)	The damage caused by the Incident only marginally increases over time. Work that cannot be completed by staff is not time sensitive.

Incident Impact is measure of the extent of the incident and of the potential damage caused by the Incident before it can be resolved.

Category	Description
High (H)	A large number of staff are affected and/or not able to do their job. A large number of [Responsibility Unit] customers are affected and/or acutely disadvantaged in some way. The financial impact of the Incident is (for example) likely to exceed \$10,000. The damage to the reputation of the unit is likely to be high. Someone has been injured.
Medium (M)	A moderate number of staff are affected and/or not able to do their job properly. A moderate number of [Responsibility Unit] customers are affected and/or inconvenienced in some way. The financial impact of the Incident is (for example) likely to exceed \$5,000 but will not be more than \$10,000.



	The damage to the reputation of the unit is likely to be moderate.
Low (L)	<p>A minimal number of staff are affected and/or able to deliver an acceptable service but this requires extra effort.</p> <p>A minimal number of [Responsibility Unit] customers are affected and/or inconvenienced but not in a significant way.</p> <p>The financial impact of the Incident is (for example) likely to be less than \$5,000.</p> <p>The damage to the reputation of the unit is likely to be minimal.</p>

Incident Priority Matrix – Given an incident of a particular urgency and impact, VPFA Shared Services will prioritize the incident into the following priority classes:

		Impact		
		High	Medium	Low
Urgency	High	1	2	3
	Medium	2	3	4
	Low	3	4	5

Incident Resolution -- VPFA Shared Services will target resolution to prioritized incidents as follows:

Priority Class Code	Description	Target Resolution Time
1	Critical	2 Hours
2	High	8 Hours
3	Medium	24 Hours
4	Low	3 Days
5	Very Low	2 Weeks

The above are standard resolution time targets and are subject to renegotiation by [Responsibility Unit] if it requires a different level of service. Details regarding renegotiated resolution times are required to be documented in an appendix to this agreement.



Purchasing/ Accounts Payable Service Partnership Agreement

By and Between

[Responsibility Unit]

And

Finance and Administration Shared Services

Introduction

This Agreement represents a Service Partner Agreement (“SPA”) between Finance and Administration Shared Services (FASS) and [Responsibility Unit] for the provisioning of Purchasing and Accounts Payable support to enhance and support departmental activities as outlined below. This document describes the services provided, financial impact (if any), processes for receiving support services and making requests, and responsibilities of the [Responsibility Unit] and FASS. The elements of the service covered by this agreement include:

- Purchasing and Contracts
- Accounts Payable
- Stores Inventory Management and Support

Cost

No charge to responsibility unit for services outlined in this agreement, unless otherwise stated.

Service Exceptions: Finance and Administration Shared Services and [Responsibility unit] mutually agree the following services are excluded from this agreement:

None

Availability Restrictions

Normal University Business Hours, Monday – Friday, 7:00am-4:00pm

Request Prioritization

Priority Code	Description	Target Response Time
1	Critical	2 Hours
2	High	8 Hours
3	Standard**	48 Hours
4	Low	5 Days
5	Very Low	30 days

**For extended or complicated procurements, customer will be contacted with a status update at least once every 5 business days until receipt of order or contract.



Response time is defined as contact with requestor via email confirming receipt of request and purchasing workflow started. A subsequent email will be sent once purchase has been completed with estimated time of arrival, or to ask for clarifications.

Departmental Responsibilities

Department responsibilities and/or requirements in support of this Agreement include:

- Adherence to all applicable University, Purchasing and Contracting and VPFA Shared Service policies, processes and procedures.
- Appropriate requisition and request prioritization as outlined in this document and in cooperation with VPFA Shared Services.
- Maintenance of all department specific documentation.
- Reasonable availability of Department representative when resolving a requisition or request.
- Timely response to requests for clarification of information and request details and priorities.
- Submit required information using forms and format provided by VPFA Shared Services.

Service Details

The following describes the services provided to [Responsibility Unit] by FASS Purchasing and Accounts Payable. A summary is provided with details below:

- 18.0 Purchasing
 - 18.1 Requisitions and Requests
 - 18.2 Contracting Support: Less than \$25,000 or within FASS delegated authority
 - 18.3 Contracting Support: Greater than \$25,000 and outside of FASS delegated authority
- 19.0 Accounts Payable
 - 19.1 Invoice Processing
 - 19.2 JV Processing
 - 19.3 Travel, Training and Employee Reimbursements
 - 19.4 Training Registrations
 - 19.5 Overtime Meals and Mileage
- 20.0 Stores Inventory Management and Support
 - 20.1 Stores Management of Inventory
 - 20.2 Ordering Materials
 - 20.3 Staging and Inventory Management
 - 20.4 Receiving and Delivery
 - 20.5 Management of "Back 40" Connex
 - 20.6 Surplus Disposition



1.0 Purchasing and Contracts

1.1 Requisitions and Requests

Services Provided	Success Measures
<ul style="list-style-type: none"> • Provide purchasing services or all commodity and service requisitions and requests under \$25,000.00 using the most cost effective means applicable and following university, state, and federal rules in a timely fashion that meets both customers and FASS timelines and needs. • Serve as the primary liaison with Purchasing and Contracting Services for all formal and informal procurements greater than \$25,000.00 and outside of FASS delegated authority. • Provide guidance during pre-requisition phase of projects, programs and needs. This includes: <ul style="list-style-type: none"> ○ Consultation and approval of appropriate purchasing method ○ Review and ensure use of any specific vendor requirements (QRF, UO-wide contract, etc.) for the procurement. ○ Review appropriate use of approved state, federal and cooperative agreements approved for use by the University. ○ Vendor review and verification for compliance with UO, state and federal policy. ○ Price verification for best university value ○ Specification review and consultation to ensure best practices in regards to transition into a best value contract ○ Serve as primary liaison with Purchasing and Contracting Services (PCS) to ensure proper procurement procedures. • Ensure appropriate director approval of requisition for budget and purchasing method • Provide tools, storage, and methods of requisition that are compatible with systems in place. • Provide data on historical purchases and market trends. • Provide training and communication methods that are compatible with systems in place. • Serve as the office of record for audit purposes and record retention • Create and process standard University of Oregon approved purchase orders following university, state and federal rules, under FASS delegated authority. 	<p>95% Response within indicated prioritized response time.</p> <p>95% confirmation of orders placed within 48 hours of award</p> <p>95% confirmation of delivery dates within 5 days after award</p>

1.2 Contracting Support: Less than \$25,000 or within FASS delegated authority

Services Provided	Success Measures
<p>ALL CONTRACTS:</p> <ul style="list-style-type: none"> • Ensure proper due diligence has been completed by requesting department • Ensure QRF involvement, when appropriate according to UO, state and federal policies. • Ensure MWESB involvement, when appropriate according to UO, state and federal policies. • Provide full representation in all dealings with PCS on purchase order and intake requirements. • Provide storage of all documents regarding purchase orders for the required retention program. • Act as primary liaison with vendors in support of the procurement. • Act as the office of record for all purchase orders processed for the department. <p>PERSONAL SERVICES CONTRACTS</p> <ul style="list-style-type: none"> • Process all requests for Personal Service Contracts (PSC) per University rules and using PCS template contract forms under \$25,000.00. • Consult with UO Human Resources units to ensure compliance with UO labor agreements 	<p>95% Response within indicated prioritized response time.</p>



<ul style="list-style-type: none"> Consult with Other UO procurement entities to review opportunities for alternative procurement methods, such as the UO retainer program for consulting services. <p>TRADE SERVICES AGREEMENTS</p> <ul style="list-style-type: none"> Process requisitions and requests for Trade Service Agreements using approved PCS template contracts under \$25,000.00. Serve as the office of record for this process. Consult with other UO procurement entities to review opportunities for alternative procurement methods, such as the UO retainer program for construction services. 	
---	--

1.3 Contracting Support: Greater than \$25,000 and outside of FASS delegated authority

Services Provided	Success Measures
<ul style="list-style-type: none"> Provide guidance in determination from requisition/request as to what process (formal/informal) is needed. Work with customer to determine evaluation committee, contract requirements, and all other aspects of the process. Serve as primary liaison for PCS and vendors during the procurement process. This includes all posting and communication requirements per UO and PCS policies. Process and intake all documents to process these requisitions/requests, and the steps required until contract execution, per PCS guidelines and policies. Review customer specifications to ensure a best value contract for the University. Provide consultation services, recommendations and requirements regarding the procurement committee, scoring and documentation of the process. Ensure appropriate budget is in place. Ensure all documentation is recorded and stored per retention requirements. 	<p>95% Response within indicated prioritized response time.</p>

2.0 Accounts Payable

2.1 Invoice Processing

Services Provided	Success Measures
<ul style="list-style-type: none"> Process and pay all invoices associated with purchasing forms on records such as placed purchase orders, PCard transactions, PSC, TSA, and other executed agreements per terms and conditions of the particular approved tool. Ensure appropriate University budgetary approval of all payments Establish guidelines and best practices for timely payment. Insure all approvals are in place, all budgets are active and proper posting of vendor and internal codes per the University FIS guidelines. Strive to capture all discounts as identified such as prompt pay and volume. Act as office of record for all documents per the University Retention Policy. 	<p>95% payment of invoices and JV to Banner within 30 days.</p>



2.2 JV Process

Services Provided	Success Measures
<ul style="list-style-type: none"> Process journal vouchers for internal charges to credit and debit expense indexes, including plant funds, as needed. Become office of record for these transactions for audit purposes. Execute shadow system data transfers on a periodic basis, as established by FASS IT and department. 	98% process within 30 days

2.3 Travel, Training and Employee Reimbursements

Services Provided	Success Measures
<ul style="list-style-type: none"> Establish criteria and forms, in conjunction with BAO and FASS HR, for employee travel and training Review reimbursement packets for compliance with UO, state and federal audit requirements Ensure appropriate budgetary approval Execute reimbursement transactions Serve as the office of record for documentation Provide consultation on university best practices in regards to travel payment and coordination 	<p>95% response to status of travel request within 48 hours of request</p> <p>95% completion of travel within 5 days</p> <p>98% reimbursement processing 3 days after submission of reimbursement package documents</p>

3.0 Stores Inventory Management and Support

3.1 – Stores Management and Inventory

Services Provided	Success Measures
<ul style="list-style-type: none"> Inventory management for FASS owned inventory and Customer owned inventory in an organized storeroom management system, controlling sales, receiving, and shelf item management using the current Computer Maintenance Management System applicable. 	98% In-stock levels



3.2 Ordering Materials from Stores

Services Provided	Success Measures
<ul style="list-style-type: none"> Orders for inventory items will be placed via CMMS system, via email, or via phone, with the required budget/work order information provided, along with name of requestor and whether the order is a will call (for customer pickup) or delivery to dept. Specific delivery information must be provided. 	95% Delivery of stock issues within 48 hours

3.3 Staging and Inventory Management

Services Provided	Success Measures
<ul style="list-style-type: none"> Inventory will be added per approval by requesting supervisor and Inventory Control Coordinator (Property Spec 3) using the required Request Template form provided. Staging space will be provided for prioritized activities per departmental needs. As an example, Preventative Maintenance kit staging. FASS Purchasing will maintain the inventory value and perform an annual inventory check for reconciliation purposes. 	95% notification of delivery of non-stock orders

3.4 Receiving and Delivery

Services Provided	Success Measures
<ul style="list-style-type: none"> Orders placed by FASS shall be received within 48 hours of arriving, including entering into CMMS and notification to customer. Provide appropriate separation of duties in regard to ordering, receipt, and payment of deliveries. Orders will be staged for ‘will call’ or delivered. Deliveries will be scheduled within 24 hours of receipt and notification being completed. A daily delivery route, based on customer delivery needs, will be provided Monday through Friday. 	98% received and staged within 48 hours

3.5 Management of “Back 40” Conex

Services Provided	Success Measures
<ul style="list-style-type: none"> Manage ‘Back 40’ Conex storage and use of the space. Establish use criteria and manage Conex access. 	100% compliance of rental procedures and record keeping



3.6 Surplus Disposition

Services Provided	Success Measures
<ul style="list-style-type: none">Coordinate with department disposal, recycling, or surplusing of excess assets.	95% of disposition documents and disposition completed within 30 days.