



Service Partnership Agreements – Cover Sheet

By and Between

[Responsibility Unit]

And

Finance and Administration Shared Services

Effective Date: July 1, 2018 – June 30, 2019

This Agreement represents a Service Partner Agreement (“SPA”) between Finance and Administration Shared Services (FASS) and [Responsibility Unit] (CPFM) 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

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This Agreement remains valid until terminated by either party or superseded by a revised agreement mutually endorsed by the stakeholders.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 [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

Associate Vice President for [Responsibility Unit]

Signature

Signature

Date

Date



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Finance and Budget Service Partner Agreement

By and Between

[RESPONSIBILITY UNT]

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

- Budget and Resource Planning Support
- Labor or Service Rate Development
- Informal Contract Support
- Accounting and Financial Support
- Forecasting and Reporting
- Accounts Payable, Billing and Accounts Receivable

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 should 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 Finance and Budget support services back to the [Responsibility Unit] or to whomever it designates prior to the termination date.

Cost

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

Availability Restrictions

Normal University Business Hours, Monday – Friday, 8:00am-4:00pm

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. If no priority is indicated, the standard response is 48 hours.

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 Asset Planning
- 2.0 Labor or Service Rate Development
- 3.0 Informal Contract Support
- 4.0 Accounting and Financial Support
- 5.0 Forecasting and Reporting
- 6.0 Accounts Payable, Billing and Accounts Receivable



1.0 Budget and Resource Planning Support

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, such 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 	95% response to outlined service timelines

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 	Avg. 4.0 or higher (on 5 point scale) as indicated on the Annual FASS customer Survey

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. 	Avg. 4.0 or higher (on 5 point scale) as indicated on the Annual FASS customer Survey



2.0 Labor or Service Rate Development

Services Provided	Success Measures
<ul style="list-style-type: none"> • Rate Policy Development and implementation • Coordination of the annual UO Fines and Fees process • 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 & Technical Support 	<p>Avg. 4.0 or higher (on 5 point scale) as indicated on the Annual FASS customer Survey</p>

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 • Annual review of established MOU's, or per established agreement review period. • Guidance and consultation on establishment of new internal or external agreements, in collaboration with UO Purchasing and Contracting services and the UO General Counsel 	<p>95% response to outlined service timelines</p>

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, funds, and supported systems. • 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. 	<p>Avg. 4.0 or higher (on 5 point scale) as indicated on the Annual FASS customer Survey</p>



<ul style="list-style-type: none"> Execute shadow system data transfers on a periodic basis, as established by FASS IT and department. 	
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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 when requested and appropriate 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 	<p>95% adherence to published reporting schedules</p>

6.0 Accounts Payable, Billing and Account Receivable

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. 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>



Human Resources Service Partner 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 services to enhance and support departmental activities as outlined below. This document describes the services provided, financial impact (if any), and responsibilities of the [Responsibility Unit] and FASS. The elements of the services covered by this agreement include:

- Recruitment
- Employee/Labor Relations
- Payroll Administration
- Organizational Development and Training
- Workforce Planning

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 should 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 HR support services back to the [Responsibility Unit] or to whomever it designates prior to the termination date.

Cost

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

Availability Restrictions

Normal University Business Hours, Monday – Friday, 8:00am-4:00pm. Specific requests for swing shift or night shift issues are accommodated.

For general inquires please contact FASS HR at fasshr@uoregon.edu. Requests will be responded to within 2 business days.

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.
- Maintenance of department specific documentation.
- Reasonable availability of Department representative when resolving an issue or request.
- Timely response to requests for information and details with priority parameters.
- Submit required information using forms and format provided by VPFA Shared Services.

Service Details and Definitions

In addition to the services provided below, FASS HR will initiate and complete an annual service survey with all departments represented by an SPA. FASS HR will serve as the primary point of contact for all department inquires and communication strategies as they relate to the services noted below. The following describes the services provided to [Responsibility Unit] by FASS HR. A detailed summary is provided below:

7.0 Recruitment

7.1 Recruitment

7.2 Onboarding

8.0 Employee and Labor Relations

8.1 Performance Management

8.2 Consultation

8.3 Investigations, Grievances, Dispute Resolution

8.4 Employee Separation

8.5 Leave of Absence

9.0 Payroll Administration

9.1 Payroll Processing and Time Entry

10.0 Organization Development and Training

10.1 Staff Engagement

10.2 Training Program Coordination

11.0 Workforce planning

11.1 Consultation

11.2 Position Management

Definitions:

- Partner: FASS HR works with Central HR to address situation
- Consult: FASS HR discusses options and provides information to supported units, FASS HR makes recommendations to supported units,
- Provide: FASS HR assists supported units as requested.
- Manage: FASS HR reviews and approves, completes, evaluates and/or processes actionable items for the supported unit
- Maintain: FASS HR ensures supported units are compliant with policies, rules and laws



7.0 Recruitment

7.1 Recruiting

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage all recruitments within the HRIS system and manage all documents associated with recruitments. • Serve as primary departmental contact for all recruitments for both applicants and division • Consult on strategies for specific hiring needs, including recommending recruitment methods targeted to specific groups of candidates • Manage budgetary allocation for posting type • Evaluate and process marketing including: advertising, and posting plan • Consult with and advise hiring Supervisor and hiring committees on recruitment best practices; committee composition; UO standards, compliance which includes a member of FASS-HR being a non-scoring member of all committees • Consult with department leadership to evaluate effectiveness of recruitment techniques and strategies • Provide initial screening services of applicant pools • Manage all pre-employment screenings; reference checks work history, education, criminal history background checks, and any other required pre-employment testing • Manage offer process and partner with central HR to ensure internal and external equity. • Consult with hiring supervisor to establish start date • Manage new hire communications including welcome letter, communications related to onboarding activities to new employee, and communications to other stakeholders as appropriate. 	<p style="text-align: center;">90% recruitment completion within 90 days (classified) and 120 days (unclassified) from requisition initiation.</p>

7.2 Onboarding

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage onboarding checklists; including enrollment in appropriate orientations. • Manage new hire paperwork; including I-9, w-4, etc. • Provide supervisor checklist to assist with communication to new employee regarding job description, departmental expectations, required training, etc. Ensure HRIS system is updated with current position information • Maintain recruitment files as the office of record. 	<p style="text-align: center;">Avg. 4.0 or higher (on 5 point scale) as indicated on the Annual FASS customer Survey</p>



8.0 Employee & Labor Relations

8.1 Performance Management

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage communication regarding evaluation due dates and overall completion rates. Collect evaluations, and track completion. • Maintain Officer of Administration files as the 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 	<p>Avg. 4.0 or higher (on 5 point scale) as indicated on the Annual FASS customer Survey</p>

8.2 Consultation

Services Provided	Success Measures
<ul style="list-style-type: none"> • Provide supervisors/managers information on how to constructively coach and focus attention on key aspects of employee behavior • Provide supervisors/managers/employees with additional human resources support when needed for various issues • Serve as point of contact for consultation regarding policy, practices, and Collective Bargaining Agreement (CBA) interpretation. • Participate in departmental or leadership teams on various initiatives, including strategic planning, projects, program development, and staffing initiatives 	<p>Avg. 4.0 or higher (on 5 point scale) as indicated on the Annual FASS customer Survey</p>

8.3 Investigations, Grievances, Dispute Resolution

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage investigations which ensure preservation of confidentiality, sensitive materials and protection of both employee, managerial and University rights • Consult with unit to develop and maintain cohesive work units with climates of cooperation and collaborative problem solving by identifying and mediating minor disputes • Consult with departments towards achieving objective resolution • Consult with department to identify core issues and conduct; follow up on recommended outcomes using disciplinary actions as appropriate. 	<p>Avg. 4.0 or higher (on 5 point scale) as indicated on the Annual FASS customer Survey</p>



<ul style="list-style-type: none"> • Provide meeting facilitation and track documentation of outcomes, assisting department with notifications, to include disciplinary letters as appropriate. • Partner with Central HR regarding implications of grievances and corresponding impacts of recommended resolutions. • Represent the University during grievances, contract disputes, arbitrations, state or federal investigation or external legal challenges • Consult with supervisors/managers on strategies for handling complex situations. 	
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8.4 Employee Separation

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage employee separation process and documentation. 	N/A

8.5 Leave of Absence

Services Provided	Success Measures
<ul style="list-style-type: none"> • Provide initial intake and triage then refer to Central HR. 	N/A

9.0 Payroll Administration

9.1 Payroll Processing and time entry

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage all payroll processes. • Manage review and audit of time submittals for employees • Manage entry of pay adjustments due to employment change actions (work out of class, temporary appointment, etc.) • Communicate salary program guidelines • Manage entry of time records into Banner for pay processing • Manage tracking, verification and ensure accuracy of pay; differentials, overtime pay, etc. • Manage upload of pay information into Departmental systems for chargeback activities • Inform managers and supervisors on payroll best practices for compliance • Provide training and updates on policy • Partner with Central Payroll on complex pay issues. 	99% standard payroll delivery each month



10.0 Organization Development & Training

10.1 Staff Engagement

Services Provided	Success Measures
<ul style="list-style-type: none"> Consult with department leadership in relation to engagement strategies and cross-departmental engagement opportunities. 	Avg. 4.0 or higher (on 5 point scale) as indicated on the Annual FASS customer Survey

10.2 Training program coordination

Services Provided	Success Measures
<ul style="list-style-type: none"> Provide consultation and support to departments for training and professional development opportunities Conduct in house training Provide logistics for training opportunities including: facility selection, AV needs, and catering Partner with Central HR to develop, design, and track professional development activities. Provide support to business partners in navigation of MyTrack. Partner with other University resources external consultants, etc. to align department based initiatives to organizational initiatives and implement improvement strategies 	Avg. 4.0 or higher (on 5 point scale) as indicated on the Annual FASS customer Survey

11.0 Workforce Planning

11.1 Consultation

Services Provided	Success Measures
<ul style="list-style-type: none"> Consult department leadership to find workable solutions for staffing issues (Return to Work, FMLA, Census), such as temporary assignments, work out of class, contract temp workers, workforce re-organizations and departmental transformations, etc. Consult with department on retention strategies which align workforce with departmental objectives Consult with department leadership on appropriate recognition strategies, in line with UO standards and collective bargaining agreements. 	Avg. 4.0 or higher (on 5 point scale) as indicated on the Annual FASS customer Survey



<ul style="list-style-type: none"> • Manage staff development through mentoring, cross-training, internships, campus staff organizations, professional associations, committee and task force assignments, and skill assessment programs • Consult with department leadership regarding workforce planning through review and evaluation of forecasted workforce projections, historical trends, metrics, and KPI analysis • Partner with Central HR, regarding complex disability management, workers compensation, and reduction in force issues Partner with Safety and Risk Services to identify and find solutions to accommodate or to minimize employee injury or worker’s compensation issues • Consult with department leadership on position and pay actions such as, equity reviews, reclassifications, and merit increases, etc. • Partner with Central HR on appropriate compensation issues 	
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11.2 Position Management

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage position description development and edit process. • Manage departmental position inventory and organizational charts • Reconcile position data to ensure accuracy. • Process compensation and position adjustment forms 	<p>Complete MyTrack submission of new and revised position descriptions within 20 business days of department submittal to FASS.</p>



Information Technology Service Partner 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 tools¹. 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.

¹ See Appendix “B” for list of software we provide.



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

None

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, FASS IT/FASS 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. FASS IT/FASS IT 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 FASS IT/FASS IT 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 FASS IT policies, processes and procedures.
- Appropriate incident and request prioritization as outlined in this document and in cooperation with FASS IT.
- Submissions via ticketing system of all service related requests and any 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.
- FASS IT must be consulted prior to introducing new software or hardware into the environment. FASS IT must also be consulted prior to moving any desktop systems. This is to both ensure that we can adequately support the environment as well as maintain an auditable physical inventory as required by University policies.

FASS IT responsibilities



FASS IT 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 FASS IT. A summary is provided with details below:

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



12.0 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 is 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 communicated by using a ticket submission via email. During business hours, FASS IT commits to a 15 minute response to incidents or requests reported via phone and within 1 hour to incidents or requests reported via email². 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, FASS IT 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 meet ensure our response time commitments are met.</p>	<p>[Outlined on page 24]</p>

13.0 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 FASS IT technicians may 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, FASS IT 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>[Outlined on page 24]</p>

² FASS IT has the capability to expand service coverage outside normal business hours if needed.



14.0 UO Network account and login support

Services Provided	Success Measures
<p>FASS IT will assist with new user network set-up plus any other changes to 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. FASS IT will, in most cases, will be acting on behalf of [Responsibility Unit] while dealing directly with service provider, Central IS.</p>	<p>[Outlined on page 24]</p>

15.0 UO Network wired and wireless local and remote connectivity

Services Provided	Success Measures
<p>This includes workstation 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, FASS IT will, in most cases, will be acting on behalf of [Responsibility Unit] while dealing directly with service provider, Central IS.</p>	<p>[Outlined on page 24]</p>

16.0 Desktop, laptop, tablet and portable device system support

Services Provided	Success Measures
<p>For the desktop, laptop, tablet and university-owned hardware utilized by [Responsibility Unit], operating system, productivity application installation, upgrade and patching are covered by this service. The service is 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 will be required. These are treated as FASS IT -initiated requests on behalf of the end-user.</p>	<p>[Outlined on page 24]</p>



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

Services Provided	Success Measures
<p>It is not unusual for shared file servers to become cluttered, disorganized and un navigable. FASS IT 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]. FASS IT will also provide on-going consultation and training on best practices to meet the responsibility unit need.</p>	<p>[Outlined on page 24]</p>

18.0 Support for our standard suite of productivity and collaboration tools

Services Provided	Success Measures
<p>For the list of applications in Appendix B, FASS IT 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.</p>	<p>[Outlined on page 24]</p>

19.0 Relationship management for services provided by Central IS

Services Provided	Success Measures
<p>Most IT-related service elements used by [Responsibility Unit] depend on the campus-wide services provided by Central IS. As part of this agreement, FASS IT will act as the broker, facilitator and source of escalation for all incidents and requests that require [Responsibility Unit] to interact with Central IS.</p>	<p>[Outlined on page 24]</p>

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

Services Provided	Success Measures
<p>FASS IT will maintain a current electronic inventory, maintenance history and replacement schedule for the desktop, laptop, tablet and university-owned hardware utilized by [Responsibility Unit]. Included in this service element is asset acquisition according to PCS</p>	<p>[Outlined on page 24]</p>



purchasing policies and asset tagging and registration per University Property Control policies.	
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21.0 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. FASS IT will monitor systems and ensure that the Anti-virus is functioning at all times. Additionally, FASS IT 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.	[Outlined on page 24]

22.0 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. FASS IT will provision devices according to contract, set-up printing services infrastructure and configure client machines to print to that infrastructure. Additionally, FASS IT will coordinate repairs, billing configuration and other aspects of the UO printing services contract.	[Outlined on page 24]

23.0 Other service and applications

Services Provided	Success Measures
If the Responsibility Unit utilizes other line of business applications that supports its mission, FASS IT will, with a separately established agreement, provide support for the application at whatever level that the customer and FASS IT care to negotiate.	[Outlined on page 24]

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 FASS IT.



BANNER Finance, HR and IDR applications and system support outside of client set-up. Drupal or other web hosting or development.

Network architecture and provisioning – these incidents and requests must go through NTS. FASS IT 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	FASS IT 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.	Avg. 4.0 or higher (on 5 point scale) as indicated on the Annual FASS customer Survey

Service Level Reporting

The FASS IT will supply [Responsibility Unit] with the following reports on the intervals indicated:



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.

University Document Management Retention Compliance

The University and/or office of General Counsel 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]. FASS IT 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, FASS IT 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 FASS IT to prioritize incidents. Note that Urgency and Impact, and thus prioritization, are determined by FASS IT 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.



	<p>A moderate number of [Responsibility Unit] customers are affected and/or inconvenienced in some way.</p> <p>The financial impact of the Incident is (for example) likely to exceed \$5,000 but will not be more than \$10,000.</p> <p>The damage to the reputation of the unit is likely to be moderate.</p>
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, FASS IT 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 -- FASS IT 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 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 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 Requisitioning Procedures
- Contract Development and Execution
- Stores Inventory Management and Support
- Process Development and EAMS Training
- Invoice and Contract Payments/PCard Reconciliation
- Travel and Employee Reimbursements
- Evaluation and Feedback

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 should 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 Purchasing and A/P support services back to the [Responsibility Unit] or to whomever it designates prior to the termination date.

Cost

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

Availability Restrictions

Normal University Business Hours, Monday – Friday, 8:00am-4:00pm



Request Prioritization

Priority Code	Description	Target Response Time
1	Critical/Emergency***	2 Hours
2	High/Local in Stock****	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. * Emergency determined by Supervisor with email confirmation to FASS Purchasing. ****Buyer reserves the right to extend to Standard if no local stock exists.

Response time is defined as contact with requestor via email confirming receipt of request and purchasing workflow started. For AiM users, specific workflow notification within the system will be used. 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.
- Commitment to utilization of AiM as main tracking and procurement program.

Service Details

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



- 24.0 Purchasing
 - 24.1 Requisitions and Requests
 - 24.2 Contracting Support (Less than 25,000 or within FASS delegated Authority)
 - 24.3 Contracting Support (greater than 25,000 and outside of FASS delegated authority)
- 25.0 Travel, Training and Employee Reimbursements
- 26.0 Stores Inventory Management and Support
 - 26.1 Inventory Management
 - 26.2 Surplus Disposition

24.0 Purchasing

24.1 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. (AiM) • Provide data on historical purchases and market trends. • Provide training and communication methods that are compatible with systems in place. (AiM) • Become the office of record for audit purposes and record retention 	<p>95% confirmation of PO or contract created within indicated prioritized response time.</p>



<ul style="list-style-type: none"> • Create and process standard University of Oregon approved purchase orders following University, State and Federal rules, under FASS delegated authority. 	
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24.2 – 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 purchasing 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 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 and contracts 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 • 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 Service Agreements using approved PCS template contracts and Purchase Orders under \$25,000.00. Become 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. 	<p>95% Response within indicated prioritized response time.</p> <p>Avg. 4.0 or higher (on 5 point scale) as indicated on the Annual FASS customer Survey</p>



24.3 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 that a formal/informal process 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>

25.0 Travel, Training and Employee Reimbursements

Services Provided	Success Measures
<ul style="list-style-type: none"> • Provide guidance and instruction for customer use of Concur for travel arrangements and reimbursements. • Assist in conference registration as part of the purchasing services and metrics will reflect accordingly. • Act as PCARD Custodian for all FASS PCARDS except for individual Travel Cards. 	<p>95% response within 48 hours of request for assistance.</p>

26.0 Stores Inventory Management and Support

26.1 – Inventory Management

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. Provide controlling sales, receiving and shelf item management system. 	<p>95% Materials received within indicated due date</p>



<ul style="list-style-type: none"> • Provide materials management services – including order placement, receiving, stocking and distribution. • Staging space will be provided for prioritized activities per departmental needs. • Provide on-demand material pickup from local vendors for emergency or critical needs. • FASS Stores will maintain the inventory value and perform an annual inventory check for reconciliation purposes. • Provide appropriate separation of duties in regard to ordering, receipt, and payment of deliveries. • Provide will-call or delivery services. Deliveries will be scheduled within 24 hours of receiving and notification being completed. • Provide a daily delivery route, based on customer delivery needs, Monday through Friday. 	
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26.2 Surplus Disposition

Services Provided	Success Measures
<ul style="list-style-type: none"> • Coordinate with department disposal, recycling, or surplus of excess assets. 	N/A