

**Purchasing Services**

**Template Contract Procedures**

**For**

**Speaker Engagement Letter**

**And**

**Services Agreement**

A [**Speaker Engagement Letter Template**](http://www.uvm.edu/~cntrllrs/forms/Speaker%20Engagement.docx) must be used if the following criteria apply:

* Honorarium/Speaker Fee will be $500 or greater

***Or***

* Speaker Travel Expenses will be $500 or greater

A [**Services Agreement Template**](http://www.uvm.edu/~cntrllrs/forms/Svcs.Agmt.Template.docx) should be used if the following criteria apply:

* The total value of the contract, including fees and expenses, will be $1,000 or greater

(*note*: If the $ value is below the applicable threshold, then it is the UVM Department’s (“Department”) choice whether or not to use a Template)

1. (a) For **Speaker Engagement Letters**, the Department completes the highlighted portions of the Letter and forwards the Letter to the Speaker for his/her first signature. The Department should ask that a scanned pdf of the signed letter is returned via email.

(b) Once the Department obtains the Speaker-signed contract, the Department will attach it to a requisition and submit in PeopleSoft **\*** well in advance of the event date. Purchasing Services will obtain the authorized UVM countersignature.

(**\*** note: payments to foreign nationals are by check request sent to Disbursement Center)

(*note*: It is imperative that the contract is fully executed prior to performance to avoid exposure to UVM)

(c) Purchasing Services will return-email the fully executed Letter (along with the Purchase Order) to the Department for its use and for forwarding to the Speaker.

1. (a) For **Services Agreements** ***valued from $1,000 and up to and including $4,999***, the Department completes the highlighted portions of the Agreement and forwards the Agreement to the *other party* (e.g. services provider, consultant, contractor, performer, artist, vendor, etc.) for his/her first signature. The Department should ask that a scanned pdf of the signed Agreement is returned via email.

(b) Only if (i) the Department makes *substantive* changes to the Template *other than* completing the highlighted portions, or (ii) the total value of the Agreement, including fees and expenses, will be **$5,000 or greater**, should the Agreement be forwarded to Wendy Spargo for review *prior to* sending to the other party for signature (Contract Analyst, Purchasing Services; wendy.spargo@uvm.edu; 802.656.3035). The Agreement will be reviewed, revised, and returned to the Department to obtain the *other party’s* signature first.

(c) Once the Department obtains the *other party’s-signed* contract, the Department will attach it to a requisition and submit in PeopleSoft **\*** well in advance of either party commencing work or otherwise acting in reliance upon the Agreement. Purchasing Services will obtain the authorized UVM countersignature.

(**\*** note: payments to foreign nationals are by check request sent to Disbursement Center)

(*note*: It is imperative that the contract is fully executed prior to performance to avoid exposure to UVM)

(d) Purchasing Services will return-email the fully executed Agreement (along with the Purchase Order) to the Department for its use and for forwarding to the *other party*.

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Questions regarding Templates or purchase orders, please contact Purchasing at:

purchasing@uvm.edu or 802.656.6610

Questions regarding invoices or payment, please contact the Disbursement Center at:

disburse@uvm.edu or 802.656.4192