

The CBE requires that all Service Agreements are submitted with this form.

Guidelines:

- ➔ The UW rules for the sale of services to outside entities are outlined in Administrative Policy Statement ([APS 59.5](#)). The purpose of this form is to help ensure knowledge of these rules and confirm compliance at the College/Department/Unit level.
 - ➔ The approval of the sale of services to outside entities belongs to the CBE Dean, with authority currently delegated to the Assistant Dean for Finance and Administration.
 - ➔ Upon completion, this form with all other supporting documentation for a Service Agreement is to be submitted to be-finance@uw.edu, where it will be reviewed for completeness and routed for approval.
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Today's Date: _____ Due Date (if any): _____

Primary Service Provider's Information:

Primary Service Provider Name: _____ **Email:** _____

Department/Unit: _____

Approving Chair/Supervisor: _____

Services Agreement Details:

Project Name (As noted on the Rate and Revenue Worksheet): _____

Customer Company: _____

Customer Contact Name: _____ **Customer Contact Title:** _____

Customer Contact Email: _____ **Customer Contact Phone:** _____

I. Project Description: Provide brief overview, reference number, or other keywords to help identify this request.

II. Period of Service:

Initiation Date: _____ **Completion Date:** _____

III. Please check all that apply to this services agreement request:

- Uses the standard CBE agreement terms to reduce processing and review times.
- Customer is a government entity.
- Customer is international, does not have a US subsidiary.

- Work will be performed abroad, or items will be exported.
- Customer has a known master research/service level agreement.
 - Please provide the number: _____
- Some services will be subcontracted to a provider outside of UW.
 - Please provide information about the subcontracted services below.

Subcontractor Details:

Subcontracted Company: _____

Subcontracted Contact Name: _____ **Subcontractor Title:** _____

Subcontractor Email: _____ **Subcontractor Phone:** _____

IV. Subcontract Description: Provide brief overview, reference number, or other keywords to help identify this relationship.

- V. Will Subcontracted services exceed \$10,000 of spend?** YES NO
- VI. Will goods purchased exceed \$10,000 of spend?** YES NO
- VII. Is there a contract in place with the Subcontractor?** YES NO
- VIII. Is the Subcontractor a verified UW Supplier?** YES NO

Project Expenses and Funding:

IX. Total Contract Amount: _____

X. Budgetary Information (choose one):

- Our department/unit has an Activity Worktag for the revenue.
 - Please provide the Worktag: _____
- We need assistance obtaining an Activity Worktag for the revenue.

XI. How do you plan to invoice (choose one):

- In advance Monthly Upon completion of work Upon completion of milestone

XII. Rate Justification

You must ensure that your fees meet or exceed market rates to safeguard the University from subsidizing your customer. To support pricing, you may wish to consider industry/external rates for similar services at UW, faculty consulting rates, external consulting rates, posted rates on company websites, and/or vendor quotes. Your department/unit is responsible for maintaining justification documentation.

Describe the process used to evaluate the marketplace when determining your rates and include any supporting documentation with your submission.

Checklist of attached materials:

- Service Agreement
- Statement of Work
- Rate Template or Budget
- Other: _____

Attestation:

Please initial below.

I confirm that that as the Primary Service Provider:

- I have verified that all services sold are substantially related to the mission of the University and the revenue collected will be used to support activities that are directly and materially related to College/Department/Unit educational or research activities.
- I have reviewed the CBE Services Agreement Policy and determined that this is the most appropriate agreement type for this work.
- I have secured the appropriate campus facilities to complete the work.
- I can comply with the terms of the agreement including any applicable provisions with requirements for contractors or subcontractors including, but not limited to, those that require certification, background checks, credentials, special protections, particular systems or software, incident responses, or disclosures/notifications, prohibiting certain purchases or subcontracts, or necessitate understanding of pertinent laws, federal requirements, etc.
- I have ensured that fees assessed will recover all costs (including direct and indirect expenses, pass-through expenses, materials, travel, salaries, taxes, and overhead) incurred by providing the service(s) and will not undercut market cost.
 - Unlike sponsored research, this should include administrative effort for invoicing, reconciliation, and expense monitoring.
- I have confirmed that none of the personnel involved with the provision of services has or presents any conflict of interest.
- I have developed a plan for, and discussed with, any affected department chair or unit supervisor how I intend to handle any situation in which payment cannot be recovered, including but not limited to a dispute with the entity buying the service(s).
- I understand that legal review by the UW Attorney General (AG) may be necessary and can take several weeks depending on the AG's availability and caseload. The Senior Vice President for the Office of Finance and Budgeting must approve any proposed sales to other governmental agencies. Requests must be submitted in a timely manner as CBE is not able to influence this timeline.

XIII. Signatures:

The information provided is true and accurate for this decision and may be used for audit documentation:

_____	_____	_____
Primary Service Provider Signature	Service Provider Printed Name	Date

I approve of this Service Agreement and the associated spend:

_____	_____	_____
Department/Unit Approver Signature	Approver Printed Name	Date