

Training for Fast Contract templates for expedited processing



Fast Contract templates for expedited processing

Use of the fast contract templates for expedited processing is for low-risk purchases that need a Statement of Work, do not include a vendor's terms and conditions or require signature.



Services Statement of Work (SOW) contract template

Download the [Services SOW template](#), fill in the requested information (you may copy and paste from the vendor's quote), and attach the *completed* template to your requisition.

Not for use for IT related contracts.



Guest Speaker contract template

Download the [Guest Speaker template](#), fill in the check boxes, and blanks as applicable and attach the *completed* template to your requisition.

Not for use for IT related contracts.

SOW & Guest Speaker Quick Templates

Use of the contract quick templates for expedited processing is intended for low-risk purchases that...



need a Statement of Work



do not include a vendor's terms and conditions



do not require signature

If changes or a different contract template is needed, the UNTS Office of Contract Administration can help you determine which contract template to use.

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Click the graphic below to view the topic section. 



I plan to use the
SOW quick
template



I plan to contract
with a speaker

UNT SYSTEM™



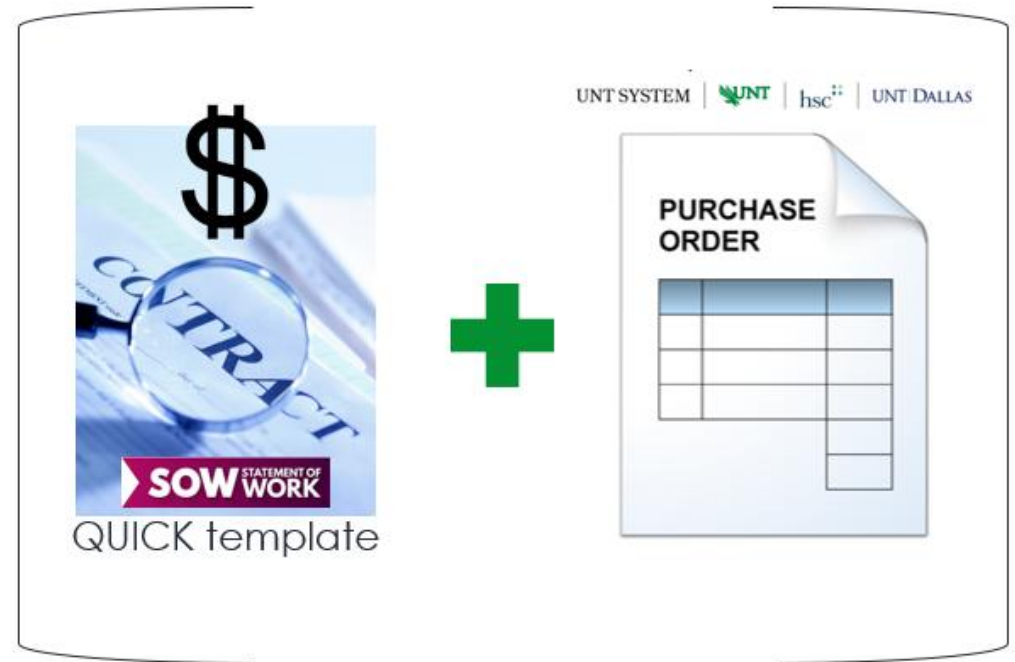
Services Statement of Work (SOW)

Services Statement of Work (SOW) contract QUICK
template

Services Statement of Work (SOW)

› This QUICK template is intended for the procurement of **SERVICES**

- Accompanies the UNT System Purchase Order (PO)
- Not a “stand alone” document
- Utilized as is – **no revisions**



Services Statement of Work (SOW)

- › This QUICK template is **NOT** intended for
- IT Related contracts/agreements
 - Contract/Agreements that require revisions to the template
 - Prepayments required by the vendor
 - **Consult your campus Office of Sponsored Research office before use*



QUICK template

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Services Statement of Work (SOW)



› Services Statement of Work (SOW) contract QUICK template is utilized as is – **no revisions.**

**If changes are needed,
use a different contract
template.**

The UNTS Office of Contract Administration can help you determine which contract template to use.

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Services Statement of Work (SOW)



How to use the SOW Quick Template

- Download the Services SOW template from the Procurement or UNTS Office of Contract Administration websites
- You or your vendor can fill in the requested information (or copy and paste from the vendor's proposal/quote)
- Attach the completed template to your E-PRO requisition
 - › Once the requisition approvals have been completed, the SOW quick template contract is considered executed and the Purchase Order will be generated/dispatched

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Services Statement of Work (SOW)

- ›  **Download the Services SOW template from the Procurement or UNTS Office of Contract Administration websites**

- Procurement webpage

- › <https://finance.untsystem.edu/procurement/index.php>

- UNTS Office of Contract Administration webpage

- › <https://finance.untsystem.edu/contract-administration/training-and-resources-oca.php>

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Services Statement of Work (SOW)

- >  **You or your vendor can fill in the requested information (or copy and paste from the vendor's proposal/quote)**

Statement of Work (SOW)

Enter Start Date of the Services

This Statement of Work ("SOW"), with an effective date of (the "Effective Date"), is between the University of North Texas System for the benefit of University of North Texas System and its Component Institutions (University) ("University") and ("Vendor") for the goods/services contemplated hereunder.

Enter Vendor name

1. Introduction

- Project Title:
- Project Start Date:
- Estimated Completion Date:
- Requisition #:

Fill in the request information

Fill in REQ #. This is how to match the SOW to the REQ/PO



Services Statement of Work (SOW)



You or your vendor can fill in the requested information (or copy and paste from the vendor's proposal/quote)

2. Parties Involved

• **University:**

• Name:

• Contact Information:

Email

Phone Number

• Role:

• **Vendor/Vendor:**

• Name:

• Contact Information:

• Role:

2. Parties Involved

• Enter contact info for University contact/Contract Liaison (the individual in the department most knowledgeable about the Services who can answer questions)

• Enter contact info for Vendor



Services Statement of Work (SOW)



You or your vendor can fill in the requested information (or copy and paste from the vendor's proposal/quote)

3. Project Overview

- A brief description of the project, including the objectives and background that led to the initiation of this project.

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See example below of an ideal Project Overview description.

EXAMPLE

Vendor helps students develop clinical reasoning skills critical to becoming a successful practitioner. Vendor provides online modules that the students will need access to in order to supplement the low patient volume at this time.



Services Statement of Work (SOW)



You or your vendor can fill in the requested information (or copy and paste from the vendor's proposal/quote)

4. Scope of Work

- Services:

- Detailed description of the services to be provided.

4. Scope of Work

- Services: detailed description of the services to be provided
- Deliverables: Itemized list of deliverables expected to be provided by the Vendor
- Exclusions: Explicitly states what is not included within the scope of this SOW.



Scope of Work/Services

- › should describe the work to be performed
- › contain any milestones, reports, deliverables, and end products expected from the performing party
- › contain a timeline for all deliverables



The problem with most Scope of Work descriptions is a lack of specificity...



Consider if there is a misunderstanding/dispute – this section of the SOW helps identify what was expected

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Scope of Work/Services OBJECTIVES Examples

Needs Improvement



Assess class needs for public health awareness. Write curriculum to address needs.

The problem with the above example is that nothing is specified. The task should have a measurable in it and the deliverable must be quantifiable.

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Scope of Work/Services OBJECTIVES Examples



Survey 4 classes of 20 students in asthma awareness. Each class will answer a 25 question survey that assesses their general knowledge of asthma issues as they relate to public health. One reviewer should take about 1 hour with each class to take the survey and another 2 hours per class to assess the data. A 10-hour curriculum for graduate student classes of up to 20 students that addresses issues of deficiencies in public health awareness in asthma prevention and care.

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Scope of Work/Services

SOFT DELIVERABLES Examples

Needs Improvement



Contractor will be required to give weekly reports of progress during the soy bean season with more frequent reports during the height of the season.

The problem with the above example is that it does not specify what needs to be in the reports, what “more frequent” means, and when the “height of the season” is.

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Scope of Work/Services

SOFT DELIVERABLES Examples



Contractor will be required to give weekly reports consisting of: wind pattern analysis, fungi spore distribution, and potential risk areas. During the height of the season, May 15-July 15, the Contractor may be required to give twice-weekly reports.

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Services Statement of Work (SOW)

>  **You or your vendor can fill in the requested information (or copy and paste from the vendor's proposal/quote)**

5. Responsibilities

- **University Responsibilities:**

- Detailed list of what the University is expected to provide or do to facilitate successful completion of the project.

- **Vendor Responsibilities:**

- Detailed list of the Vendor's duties and commitments in relation to the project.

5. Responsibilities

- **University Responsibilities:** detailed list of what the University is expected to provide or do to facilitate successful completion of the project.
- **Vendor Responsibilities:** detailed list of the Vendor's duties and commitments in relation to the project.

Hint: work backwards from the Vendor responsibilities. Then be sure to list here what the University needs to provide to the Vendor for the Vendor to deliver.



Services Statement of Work (SOW)



You or your vendor can fill in the requested information (or copy and paste from the vendor's proposal/quote)

6. Milestones and Schedule

- A timeline detailing important milestones, including dates for the commencement and completion of specific phases or tasks.

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Services Statement of Work (SOW)

- >  **You or your vendor can fill in the requested information (or copy and paste from the vendor's proposal/quote)**

7. Performance and Quality Standards

- Description of the standards by which the service and deliverables will be measured.

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EXAMPLE

- *Vendor has provided all of the Services included in the SOW.*
- *University has agreed that all deliverables of the Project are completed and accepted.*
- *Vendor has provided the number of hours specified in the SOW.*



Services Statement of Work (SOW)

- >  **You or your vendor can fill in the requested information (or copy and paste from the vendor's proposal/quote)**

8. Key Performance Indicators (KPIs)

- List and description of KPIs that will be used to measure the performance of the Vendor in relation to the project's objectives.

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- List and description of KPIs that will be used to measure the performance of the Vendor in relation to the project's objectives.



Services Statement of Work (SOW)

- >  **You or your vendor can fill in the requested information (or copy and paste from the vendor's proposal/quote)**

9. Reporting and Meeting Schedule

- Schedule and expectations for progress reports and meetings, including frequency, mode, and specific content to be covered.

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Services Statement of Work (SOW)

- >  **You or your vendor can fill in the requested information (or copy and paste from the vendor's proposal/quote)**

10. Amendments and Modifications

- Procedure for making amendments or modifications to the SOW.

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Services Statement of Work (SOW)

- >  **You or your vendor can fill in the requested information (or copy and paste from the vendor's proposal/quote)**

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- Procedure for making amendments or modifications to the SOW.

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Hint: Amendments or modification must be in writing and show agreement by all parties.



Services Statement of Work (SOW)



>

You or your vendor can fill in the requested information (or copy and paste from the vendor's proposal/quote)

Statement of Work Terms

Applicability of Purchase Order Terms and Conditions: The terms and conditions set forth in the associated University of North Texas System Purchase Order (PO) are fully incorporated herein by reference and shall govern this Agreement except where explicitly modified or excluded in this Statement of Work (SOW). All terms provided in the PO, including but not limited to payment terms, indemnifications, warranties, and confidentiality obligations, shall remain in effect unless otherwise stipulated under this SOW. Any modifications or exceptions to the standard PO terms as applicable to this specific engagement must be explicitly agreed upon in writing and included within this SOW. This form is not a binding contract without the associated Purchase Order.

The terms and conditions of the PO can be found at <https://finance.untsystem.edu/vendor-resources/index.php>.

Acceptance of Terms through Performance or Delivery: By confirming the Purchase Order associated with this SOW, commencing any work, or delivering any goods specified herein, the Vendor acknowledges and accepts the terms and conditions contained within both the PO and this SOW. This acceptance constitutes a binding agreement to adhere to all terms, obligations, and conditions as outlined, including those related to project deliverables, timelines, and quality standards.



No modifications, revisions, redlines, or strikeouts are allowed here.

If the Vendor does not agree to these terms as is, you must DISCONTINUE use of this SOW Quick template.

Contact the UNTS Office of Contract Administration for further assistance.

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Services Statement of Work (SOW)

- >  **Attach the completed template to your requisition**



Contract Liaison or Requestor



QUICK template



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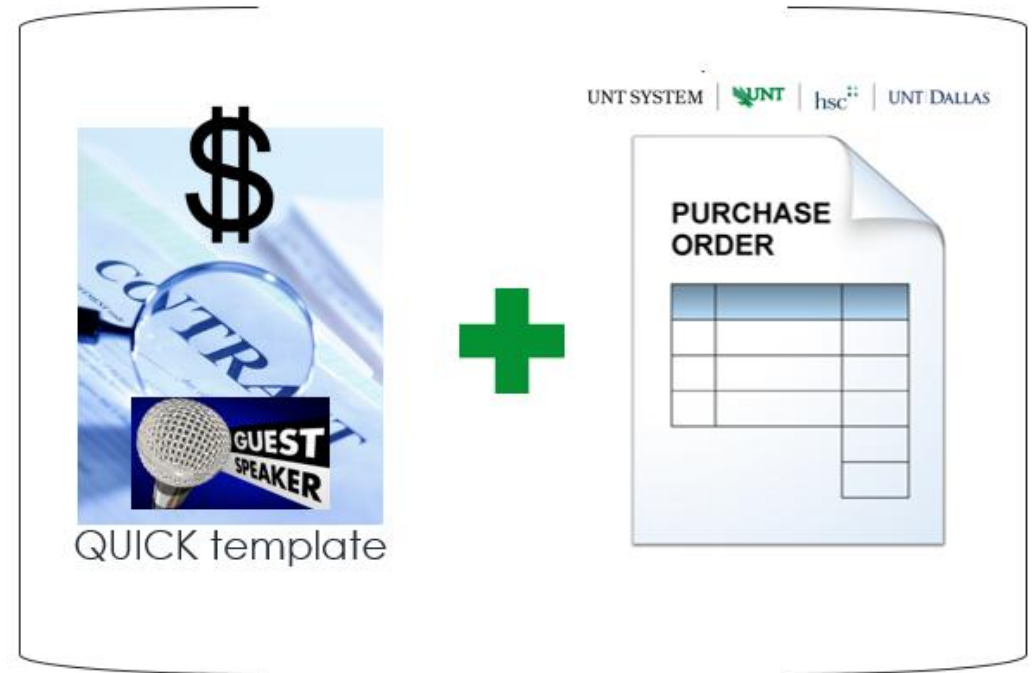
Guest Speakers

Guest Speaker contract QUICK template



Guest Speaker Quick Template

- › This QUICK template is intended for the procurement of **SERVICES** for a speaker
 - Accompanies the UNT System Purchase Order (PO)
 - Not a “stand alone” document
 - Utilized as is – **no revisions**



Question



Contract Liaison or Requestor



QUICK template



› Is a contract for a speaker or presenter required?

No a contract for a speaker is not *required*. You can choose the [Payment Request](#) option, which doesn't require a contract document and ensures prompt payment.

To determine use of a contract, consider:

- Elements of the speaking engagement/presentation that are important to agree to and/or document in advance (i.e. topic, recording the session, use of photographs, reuse of presentation materials, etc.)

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QUICK template

Guest Speaker Quick Template

- › This QUICK template is **NOT** intended for
 - Contract/Agreements that require revisions to the template
 - Contract/Agreements that require signature of University signatories



QUICK template





Guest Speaker Quick Template



› Guest Speaker contract QUICK template is utilized as is – **no revisions.**

**If changes are needed,
use a different template.**

The UNTS Office of Contract Administration can help you determine which contract template to use.

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QUICK template

Guest Speaker Quick Template

> **How to use the Guest Speaker Quick Template**

- Download the Guest Speaker quick template from the Procurement or UNTS Office of Contract Administration websites
- Fill in the check boxes, and blanks as applicable
- Send to the Guest Speaker/Presenter to sign the contract
- Attach the completed/signed template to your E-PRO requisition
 - › Once the requisition approvals have been completed, the Guest Speaker quick template contract is considered executed and the Purchase Order will be generated/dispatched

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Guest Speaker Quick Template

>  **Fill in the check boxes, and blanks as applicable**

GUEST PRESENTER CONTRACT

Effective Date:	Date of Purchase Order
University:	
University Address:	
Department or Sponsor:	
Guest Presenter:	
Guest Presenter Address:	
ATTN:	
Date(s)/Term of Contract:	
Time(s):	
Location(s):	
Additional Terms:	
Payment of Compensation (fees/honoraria):	The terms for Payment of Compensation under this Agreement are set forth in Attachment "A", attached hereto and incorporated herein for all purposes.
Requisition #:	

Fill in the request information



This Agreement is for the purpose of providing educational content(s) to University affiliates and guest attendees ("Presentation"). University and Guest Presenter shall be collectively referred to hereinafter as the "Party" or "Parties."

Fill in REQ #. This is how to match the SOW to the REQ/PO





Guest Speaker Quick Template

>  **Fill in the check boxes, and blanks as applicable**

Work with the Guest Speaker/Presenter to fill in the checkboxes and blanks



Ensure that the selections are observed during the contract term.

3. Guest Presenter confirms to present in the following format:
 Video Conference / On Location / Hybrid (speaker on location; audience both in person and online)

4. Guest Presenter

<input type="checkbox"/> agrees / <input type="checkbox"/> does not agree	to submit the W9 form to _____ upon the effective date of this contract.
<input type="checkbox"/> agrees / <input type="checkbox"/> does not agree	that photographs, whether still or action, videos, film and/or motion pictures, and/or audio recordings may be taken of Guest Presenter, individually or with others, by or on behalf of UNIVERSITY, and that information, printed or electronic, may be provided by Guest Presenter (collectively, the "Materials") in connection with the Presentation to be provided indicated above and agrees that all rights therein shall irrevocably, exclusively, unconditionally, and perpetually belong to UNIVERSITY and that such rights are freely assignable by UNIVERSITY.
<input type="checkbox"/> agrees / <input type="checkbox"/> does not agree	to use of Guest Presenter's name in connection with these recordings.
<input type="checkbox"/> agrees / <input type="checkbox"/> does not agree	that, without any compensation or notification to or approval by Guest Presenter, the Materials may be used, reproduced or otherwise disseminated or published by or on behalf of UNIVERSITY directly or indirectly for any purpose, including but not limited to advertising and/or promotional purposes, in any manner, and at any time that UNIVERSITY desires.
<input type="checkbox"/> agrees / <input type="checkbox"/> does not agree	to require signed permission and/or payment for reuse of presentation materials at a future date if materials are reused.





Guest Speaker Quick Template

>  **Fill in the check boxes, and blanks as applicable**

Work with the Guest Speaker/Presenter to fill in the checkboxes and blanks



Ensure that the selections are observed during the contract term.

Exhibit A

<p>Payment of Compensation (fees/honoraria):</p>	<p>Payable to: <input type="text"/></p> <p><input type="checkbox"/> No fee will be charged.</p> <p><input type="checkbox"/> A lump sum/honorarium not to exceed \$ <input type="text"/></p> <p>Payment to be made <input type="checkbox"/> upon close of engagement <input type="checkbox"/> 30 days from receipt of invoice</p> <p><i>NOTE: Expenses checked above for reimbursement shall not exceed the amounts and types approved for employee reimbursement pursuant to UNIVERSITY policy. A copy of such policy is available upon request.</i></p>
<p>Reimbursement for Materials</p>	<p>Check the applicable boxes:</p> <p><input type="checkbox"/> No reimbursement for material used</p> <p><input type="checkbox"/> Reimbursement for <input type="text"/></p> <p><input type="checkbox"/> Permission granted to utilize material in the future for <input type="text"/></p>
<p>Other Reimbursements (receipts required):</p>	<p><input type="checkbox"/> Yes / <input type="checkbox"/> No. If yes, please describe the reimbursement: <input type="text"/></p>





Guest Speaker Quick Template

- >  **Send to the Guest Speaker/Presenter to sign the contract**

Agreed to by:

GUEST PRESENTER:	
By: _____	Date: _____

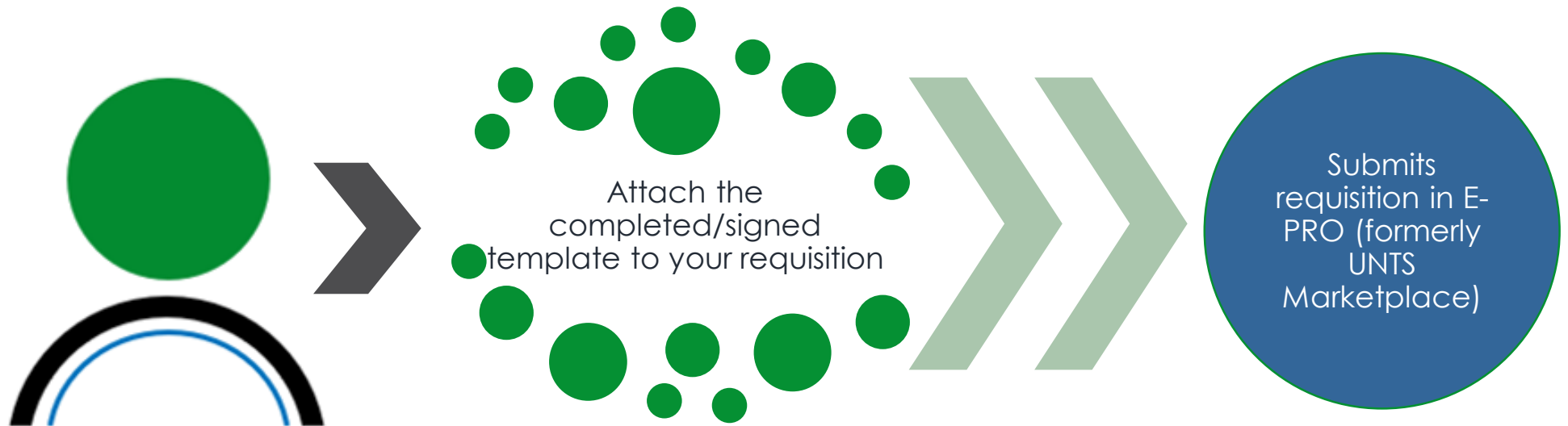




QUICK template

Guest Speaker Quick Template

- >  **Attach the completed template to your requisition**



Contract Liaison or Requestor



QUICK template

- Department
- Contracting
- Organization
- BSC Purchasing
- Contract Admin.
- Office of General Counsel
- UNTHSC Signatories

Questions/Resource

UNTS Office of Contract Administration (OCA)

- › Department Email: UNTScontractadmin@untsystem.edu
- › HSC Internal webpage:
[https://myunt.sharepoint.com/sites/HSCFinanceWebsite/SitePages/Total-Contract-Manager-\(TCM\).aspx](https://myunt.sharepoint.com/sites/HSCFinanceWebsite/SitePages/Total-Contract-Manager-(TCM).aspx)
- › UNTS OCA webpage:
<https://finance.untsystem.edu/contract-administration/index.php>

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