

Personal Services Contract Worksheet Overview

A Personal Services Contract or Invoice is necessary if your organization will be using student fee funds to pay a contractor for services. The Personal Services Contract Worksheet is not an official contract rather it is a document to collect important details to prepare an agreement.

Items that require special attention and need to be highlighted in the agreement:

- International contractor
- Individual/business not utilizing email (hard copy documents exchanged via US mail)
- Special payment terms

Process

1. Complete the Personal Services Contract Worksheet. Please type or legibly write detailed information for all sections of the worksheet.
2. Please submit **no later than 5 weeks before the services are to be provided**.
3. Submit the worksheet with an approved Purchase Request for each index to

AABC Contracts Office, 350 Student Experience Center

AABC.SECContracts@oregonstate.edu

4. A Contract will be prepared from the information provided in the worksheet.
5. The contract will then be sent to the Department Contact to review.
6. After approval, the AABC will then distribute the agreement to the involved parties for signatures/approval.
7. A payment will not be made to the contractor without contract completion prior to the event or service.

Key Terms

The **Contractor** is the individual/business providing a service to Oregon State University. Services may include: performer/vendor/speaker/individual/business that we would like to contract with to provide the agreed upon service.

The **Facility Manager** is the individual responsible for facility rentals (i.e. Deb Mott at the MU).

Policies

- **Per OSU FIS Policy 411-07, Official Guests receiving compensation** - all incurred expenses (including meals, lodging, transportation, etc.) are incorporated in the PSI/PSC payment amount and should be coded as appropriate to the expense; not travel account codes.
- **Per Policy 101-002: Procurement Ethics and Conflict of Interest: Purchasing from or Contracting with OSU Employees, Relatives of OSU Employees or Members of the OSU Employee's Household:** OSU may only purchase from or contract with OSU employees, relatives of OSU employees (relative as defined in ORS 244) or members of the OSU employee's household if the OSU employee is not involved in the selection, award or administration of the purchase/contract and all of the following requirements are met:
 - The OSU employee must complete the "Disclosure of Real or Potential Conflict of Interest" form and submit to the Procurement office for review.
 - It has been determined by Procurement that no real conflict of interest exists or if a conflict exists, it has been mitigated.
 - The OSU employee, employee's relative or member of the employee's household must be determined to be an Independent Contractor for the services being proposed. In the case of an OSU employee as a vendor, the goods or services sought for purchase or contract must be substantially different from the work the employee performs in their employment with OSU.

Personal Services Contract **Worksheet**

PLEASE NOTE: This worksheet is **not** an official contract

Page 2 of 3

SECTION 1. CONTRACTOR INFORMATION *(Individual/Business to Perform Services at Event)*

NAME (Individual, Agent, or Business): _____

☐ **Yes** ☐ **No** If contracting with an individual, are they a current OSU Student?

☐ **Yes** ☐ **No** If contracting with an individual, are they a current OSU Employee?

MAILING ADDRESS: _____

City: _____ State: _____ Zip: _____

BILLING ADDRESS: _____

City: _____ State: _____ Zip: _____

Phone: _____

Email: _____ Fax: _____

Website: _____

SECTION 2. SPONSORING DEPARTMENT INFORMATION

Name of Sponsoring Department(s): _____

Department Contact: _____

Name of Sponsorship Organization: _____

Index(es) to be used For Payment: _____

SECTION 2. EVENT INFORMATION

Title of Event: _____

Location of Event: _____ Room: _____

- | | | |
|------------------------------|-----------------------------|---|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Has the Facility Manager been contacted about the Event? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Has Risk Management been contacted about the Event? If yes, provide documentation. |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Will photographs be taken of OSU students at the Event? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Has OSU Marketing been contacted about the Event? If yes, provide documentation. |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Is merchandise being sold by the Contractor at the Event? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Are tickets being sold for the Event? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Are children under the age of 18 involved in the Event? |
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | Is this activity only one component of a larger Event? If yes, provide total event details. |

If Yes to any of the above questions, please provide details in the Overview of Services section.

When complete return this worksheet with an approved Purchase Request to: AABC Contracts Office, 350 Student Experience Center or to AABC.SECContracts@oregonstate.edu for processing.

Personal Services Contract **Worksheet**

PLEASE NOTE: This worksheet is **not** an official contract

Page 3 of 3

SECTION 2. DETAILS OF SERVICE TO BE PROVIDED

Total Amount Being Paid for Services: \$ _____

Starting Date of Service: _____

Ending Date of Service: _____

Starting Time of Service: _____

Ending Time of Service: _____

Overview of services to be provided in detail:

Contractor to Provide (i.e. equipment, handouts, presentation materials):

1. Coordination & payment of all travel, lodging and meals
- 2.
- 3.
- 4.
- 5.
- 6.

Department to Provide (i.e. tables, equipment, sound system, lighting, parking):

1. Payment net 30 days
- 2.
- 3.
- 4.
- 5.

When complete return this worksheet with an approved Purchase Request to: AABC Contracts Office,
350 Student Experience Center or to AABC.SECContracts@oregonstate.edu for processing.