These instructions are for the completion of the Services Agreement - Short Form only.

When to Use – Short Form or Long Form

Here are a few questions to ask when deciding whether to use the short or long form services agreement:

- Is the contract risk level high (due to either health and safety, financial, legal, privacy protection, reputational, or other reasons)?
- Will there be confidential information disclosed in the course of the contract?
- Will the contractor have access to information (non-confidential) that we want to remain secure?
- Do we need to pre-approve subcontractors?
- Do we need a dispute resolution clause?
- Are the insurance needs especially complicated?
- Do we require ownership of intellectual property rights in the produced material?

If the answer to any of the above questions is yes then a long form services agreement is likely warranted.

Services Agreement – Contractor Information

- This form is to accompany the original Services Agreement upon submission to Purchasing Services.
- Contractor is to provide all information required in the Contractor Information section.
- The University contact is to complete all information required in the UVic Agreement Contact section.

Services Agreement – Non-Academic, Short Form

- Section 1: Contractor is to provide full company name and corporate address.
- Services: Provide a brief and complete synopsis of the services to be provided as outlined in Schedule C - Description of Services.
- Location: Provide the location where the services will be provided.
- Term Start Date: Provide the date the services will commence.
- Term End Date: Provide the date the services are expected to conclude.
- Fees: Provide the fee structure and the estimated total fees.
- Expenses: Provide the allowable expenses and the estimated total expenses.
- Maximum Contract Amount: Provide the maximum dollar value for the total contract including fees and expenses.

Schedule A – General Conditions

- Neither alterations nor additions are permitted. Please use Schedule B – Special Conditions.
Schedule B – Special Conditions

- Include any provisions of the contract that are unique to the project under consideration and do not fall under the general conditions as outlined in schedule A. If additional pages are required please provide an attachment in a Word or .PDF format document.

Schedule C – Description of Services

Provide a clear and complete description of the services to be performed within the scope of this agreement. The end result or deliverables should be detailed, quantifiable, and time specific. Answer the following questions: who, what, where, why and how? The following examples are not exhaustive and are to be used as a guideline only:

- What specific deliverables do you expect to receive?
- What performance or service level is expected to be acceptable?
- What is the format of the deliverables, milestones or deadlines for review or payment?
- How will completion will be determined for both milestones and contract completion?
- Attach a project plan and schedule if available.
- What are the conditions for payment?
- Have you established key performance indicators? If so, insert them.

If additional pages are required or if the services are outlined in part or in full in another document such as a proposal, please provide an attachment in a Word or .PDF format document.

Schedule D – Fees and Expenses

Describe the fees, types of expenses payable and the applicable payment schedule. State whether expenses (if any) must be pre-approved. The following additional expenses may be considered in this agreement:

- Compensation for these services may be based on an hourly or daily rate, a fixed cost based on deliverables, or some other fee structure mutually agreed upon.
- Parking costs while performing work on behalf of UVic.
- Travel costs as approved in advance in accordance with UVic Travel Policy, as and when required.
- Miscellaneous costs associated with completion of work.

The maximum dollar amount payable is the combination of the maximum fees and the maximum expenses. Even if the work is done as needed and/or at an hourly rate a maximum amount payable must be set. In such a case, include an estimated cost and an estimated maximum cost.

Schedule E – Privacy Protection and Patriot Act Provisions – (if required)

- Attach Schedule E if the performance of the services may result in the provision by UVic to the contractor, or the collection by the contractor on behalf of UVic, of personal or confidential information
- If the Privacy Protection and Patriot Act Schedule is attached, no alterations are permitted.