

**If you have any questions regarding purchasing a commodity or a service,
please contact the LHU Purchasing Staff:**

- **Becky Proctor (Director of Procurement) 570-484-2010**
- **Kelly Hibbler (Service Purchase Contracts & Equipment Leases) 570-484-2015**
- **Lorie Smith (Purchase Orders for Commodities, etc.) 570-484-2701**
- **Heidi Andrews (Clerk Typist II – Procurement Office) 570-484-2019**

**CONTRACT SERVICE REQUEST FORMS
AND RELATED INFORMATION**

**NOTE: Only the University contracting officers are permitted to sign contracts on
behalf of the University**

Any University faculty or staff member entering into contracts whether verbally or by signing an agreement without the proper authorization may be acting outside the scope of their employment, and may be held personally liable for the cost of the service.

UNIVERSITY BLANKET CONTRACTS:

Please note that the University has “*Blanket Contracts*” in place for certain services.
If applicable, you are required to utilize these contracts for services beginning
July 1, 2009 – June 30, 2010.

SP#4000017948 - Susquehanna Transit (For Any & All University Approved Trips)
SP#4000017952 - Susquehanna Transit (Athletics Only)
SP#4000016427 - Best Western Lock Haven
SP#4000016410 - Hampton Inn of Lamar
SP#4000016409 - Comfort Inn of Lamar
SP#4000017722 – GTS-WELCO (RE: Gas Cylinders for Main & Clearfield Campus)

**IF YOU ARE A MEMBER OF THE IMPLEMENTATION TEAM FOR ON-LINE
REQUISITONING, YOU WILL COMPLETE ON-LINE REQUISITION FORMS TO
USE THE ABOVE REFERENCED BLANKET CONTRACTS.**

**IF YOU ARE NOT A MEMBER OF THE IMPLEMENTATION TEAM FOR ON-LINE
REQUISITIONING, YOU WILL CONTINUE TO FOLLOW THE PROCEDURES
OUTLINED BELOW:**

Contract Service Request Forms (CSRF) are to be used for bringing individuals/contractors on campus to provide a “*Service*” or a “*Furnish & Install*”. In addition, you will process a Contract Service Request Form if you are trying to use a University Blanket Contract.

Examples of services include: Speakers, Consultants, Entertainers, Poetry/Book Readings, Preventative Maintenance, Maintenance on Equipment, Annual Inspections, Bus/Van Rentals for Field Trips, Rentals, Photographers, Interpreters, Leases, etc.

PROCEDURES:

- The Contract Service Request Form must be filled out *completely*. The completed form with all required signatures should be forwarded to the purchasing office, East Campus

J-211. Incomplete forms will be returned to the Requestor. Any paperwork you receive from a potential contractor/presenter should be attached to your Contract Service Request Form. The university cannot always agree to the terms and conditions found in standard agreements/quotes provided by vendors or service providers. The Purchasing Office will review the paperwork and make any necessary changes. The paperwork will then be made an "attachment" to our contract and any and all changes will be agreed to prior to the contract being executed.

- Contracts for \$1,500 or more, MUST be reviewed by University Legal Counsel. Please allow 4 – 6 weeks for those contracts to be processed.
- Contracts over \$10,000 must be bid. When filling out the Contract Service Request Form, in the lower right corner, there is an area for 2 other possible bidders and addresses. Please provide at least 3 vendors, and their addresses, who can provide the service. Bid packages with complete specifications will be mailed to those people; an ad will be placed on the DGS eMarketplace website; and an ad will be placed on the LHU Purchasing Department website, in order to meet our bidding requirements. Purchasing will set a date and time for the bid opening, which you are welcome to attend. Once the bids are reviewed and the lowest bid is determined, the contract will be prepared for that contractor, unless other criteria is established for the awarding of the bid.
- If you are bringing someone on campus and they require immediate payment following the presentation/service, a signed "General Invoice" must be prepared, signed by the individual requesting the contract. The General Invoice may accompany the CSRF or be presented to the Accounts Payable office after you have received your fully executed copy of the contract. Note: General Invoices must be submitted no later than 48 hours prior to the event to insure a check will be available.
- If you are planning to pay someone a fee for their service and reimburse expenses (i.e. mileage, lodging, and meals) please indicate that on your Contract Service Request Form. When the contract is written, it will include the fee and all expense reimbursement amounts. University travel forms should not be used for anyone who is not a university employee or a candidate.
- It is the University's policy to NOT make deposits for contractors/presenters, nor do we prepay for services.

The following can delay the final execution of a contract. Please include this in your planning:

- 1). Failure to fully complete the CSRF and secure all required signatures.
- 2). The Contractor must sign and return the original contract to the Purchasing Office "prior" to the services being rendered.
- 3). University legal counsel must review all contracts over \$1,500 "prior" to the services being rendered.
- 4). Contracts for amounts over \$20,000 must be reviewed by both University Legal Counsel and the Office of the Attorney General "prior" to the services being rendered.

What is the process of Creating and Approving a Service Purchase Contract?

The process of creating and approving Service Purchase Contracts is illustrated in the [SPC Flow Chart \(\\$10,000 or less\)](#) and the [SPC Flow Chart \(Over \\$10,000\)](#). The SPCs are created and approved as follows:

Amount of contract is not more than \$1,499.99:

- Contract Service Request Form (CSRF) is created by the Department and forwarded to the Purchasing Department.
- Service Purchase Contract (SPC) is created by the Purchasing Department and mailed to the Contractor.
- Contractor signs the contract and returns it to the Purchasing Department.
- The Purchasing Department sends a fully executed copy of the contract to the Contractor, the Requestor, and Accounts Payable.

Amount of contract is between \$1,500 and \$20,000:

- CSRF is created by the Department and forwarded to the Purchasing Department.
- Contract is created by the Purchasing Department and mailed to the Contractor.
- Contractor signs the contract and returns it to the Purchasing Department.
- Purchasing Department sends the signed contract to the University Legal Counsel for review and approval.
- Legal Counsel returns the contract to the Purchasing Department.
- Purchasing Department sends a fully executed copy of the contract to the Contractor, the Requestor, and Accounts Payable.

Amount of contract is over \$20,000 and between \$500,000:

- CSRF is created by the Department and forwarded to the Purchasing Department.
- Purchasing Department processes the necessary bidding or Sole Source documents.
- Contract is created by the Purchasing Department and mailed to the Contractor.
- Contractor signs the contract and returns it to the Purchasing Department.
- Purchasing Department sends the contract to University Legal Counsel for review and approval.
- Legal Counsel reviews and approves the contract and sends it to the Pennsylvania Attorney General for review and approval.
- The Pennsylvania Attorney General's Office reviews and approves the contract and returns it to the State System Legal Department.
- The State System Legal Department returns the contract to the Purchasing Department.
- The Purchasing Department sends a fully executed copy of the contract to the Contractor, the Requestor, and Accounts Payable.

Amount of contract exceeds \$500,000:

- CSRF is created by the Department and forwarded to the Purchasing Department.
- Purchasing Department processes the necessary bidding or Sole Source documents.
- Contract is created by the Purchasing Department and mailed to the Contractor.
- Contractor signs the contract and returns it to the Purchasing Department.
- Purchasing Department sends the contract to University Legal Counsel for review and approval.
- Legal Counsel reviews and approves the contract and sends it to the Pennsylvania Attorney General for review and approval.
- The Pennsylvania Attorney General's Office reviews and approves the contract and sends it to the Governor's Office of General Counsel for review and approval.
- The Governor's Office of General Counsel reviews and approves the contract and returns it to the Pennsylvania Attorney General's Office.
- The Pennsylvania Attorney General's Office returns the contract to the University Legal Counsel.
- Legal Counsel returns the contract to the Purchasing Department.
- The Purchasing Department sends a fully executed copy of the contract to the Contractor, the Requestor, and Accounts Payable.

How much time is required to process a request for purchase of services?

The time required to process a request for service varies, and is primarily dependent on the dollar amount of the contract. Please note that these timeframes are approximate and begin after a fully approved Contract Service Request Form is received in the Purchasing Department. The general guidelines are as follows:

<u>Amount of Service</u>	<u>Time Required to Process</u>
Cost of service is not more than \$1,499.00.	About 1 - 2 weeks
Cost of service is between \$1,500 and \$20,000.	About 3 - 5weeks
Cost of service is between \$20,000 and \$500,000	About 6 weeks
Cost of service is over \$500,000	About 12 weeks

The timeframes given above are general guidelines only. Occasionally disagreements may arise between Contractors and State System attorneys when negotiating contract terms & conditions. This can add dramatically to the time required to process the contract. Please consider the above guidelines as minimum time-periods.