This form is **not applicable** to RESEARCH CONTRACTS. [Research contract forms](https://www.upei.ca/research-services/forms) are available and submitted via the [Romeo portal](https://upei.researchservicesoffice.com/Romeo.Researcher/).

Contract #:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| PART 1: ORIGINATING UNIT CONTACT INFORMATION | | | | | | | | | | | | | | | | | | | | |
| Unit: |  | | | | | | | Submitted by: | | |  | | | | | | Date: |  | | |
| PART 2: CONTRACT INFORMATION | | | | | | | | | | | | | | | | | | | | |
| Parties: **UPEI &** | | |  | | | | | | | | | | | | | Start Date | | |  | |
| Contract Title: | | |  | | | | | | | | | | | | | End Date | | |  | |
| Purpose of the Contract: | | |  | | | | | | | | | | | | | | | | | |
| Value of Contract: | | | $ | | | | | | Account #: | |  | | | | | | | | | |
| **OR**  new account required | | | | | | | | | |
| PART 3: TYPE OF CONTRACT *(check box and complete the indicated section on the next page)* | | | | | | | | | | | | | | | | | | | | |
| Fee for Service *(Section A)*  Service *(Section B)*  Funding *(Section C)* | | | | | Lease *(Section D)*  Secondment *(Section E)*  MOU, MOA & Other *(Section F)* | | | | | | | | | | Amendment *(Section G)* | | | | | |
| PART 4: APPROVALS | | | | | | | | | | | | | | | | | | | | |
| *I have reviewed and approved the business terms of this contract and recommend signature by the appropriate Official Signing Officer(s).* | | | | | | | | | | | | | | | | | | | | |
| Position | | Name | | | | | Department/Unit | | | | | | Signature *(check box if email approval)* | | | | | | | Date |
| Account Authority | |  | | | | |  | | | | | |  | | | | | | |  |
| Dean/Director/AVP | |  | | | | |  | | | | | |  | | | | | | |  |
| *Additional approvals required:* | | | | *Contracts equal to or greater than $25,000 requires approval of appropriate VP or President* | | | | | | | | | | | | | | | | |
| Vice President or President | |  | | | | |  | | | | | |  | | | | | | |  |
| *Additional approvals required:* | | | | *Contracts equal to or greater than $500,000 requires approval of the President* | | | | | | | | | | | | | | | | |
| President | |  | | | | | President’s Office | | | | | |  | | | | | | |  |
| PART 5: CONTRACT REVIEW *(do not complete)* | | | | | | | | | | | | | | | | | | | | |
| Unit | | | Signature | | | | | | | Date | | Comments *(if space insufficient, attach separate document)* | | | | | | | | |
| Contract & Insurance | | |  | | | | | | |  | |  | | | | | | | | |
| Additional review/approval required  *- to be determined by the Contracts & Insurance Office (check box if email approval provided)* | | | | | | | | | | | | | | | | | | | | |
| ☐ Comptroller | | |  | | | | | | |  | |  | | | | | | | | |
| ☐ ITSS | | |  | | | | | | |  | |  | | | | | | | | |
| ☐ Privacy | | |  | | | | | | |  | |  | | | | | | | | |
| ☐ Human Resources | | |  | | | | | | |  | |  | | | | | | | | |
| PART 6: DISTRIBUTION (COMPTROLLER’S OFFICE USE ONLY) | | | | | | | | | | | | | | | | | | | | |
| ☐ Fundamental Institutional Contract | | | | | | Fully-signed contract sent to: | | | | | | | | ☐ Originator ☐ Procurement  ☐ Other: | | | | | | |
| ☐ Contract forwarded for external signature | | | | | | Other notes: | | | | | | | | | | | | | | |
| ☐ Fully-signed contract received | | | | | |

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| --- |
| **IMPORTANT** - Contracts may only be signed by an **Official Signing Officer** or **Designated Signing Authority** in accordance with the [*Signing Authority Policy*](http://www.upei.ca/policy/adm/fin/gnl/0007). If contract is an Authorized Document signed by a Designated Signing Authority in accordance with a Signing Authority Designation Agreement, then it may be permitted to use the expedited Contract Logging Process *(see Contract Logging Form - C&I Form-008)*. |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **PLEASE COMPLETE - REQUIRED FOR ALL TYPES OF AGREEMENTS** | | | | | | | | | |
| Is this contract a renewal, extension or amendment? | | | | | Yes  No | | Please insert previous or original contract number(s) here: | | |
| Is the contract renewable? | | | | | Yes  No | |  | | |
| Is value of contract greater than $100,000? | | | | | Yes  No | | If yes**:**  Requires two Official Signing Authorities signatures  Please ensure that the contract includes two signature lines | | |
| Is the contract for the purchase of software, hardware, technology or technology services? | | | | | Yes  No | | If yes**:**  ITSS review required. | | |
| Are we or our contractor collecting or disclosing personal information? | | | | | Yes  No | | If yes**:**  Privacy review required. | | |
| Does UPEI require the Contractor to have insurance? | | | | | Yes  No | | If yes**:**  Attach Contractor’s Certificate of Insurance  Is UPEI named as an additional insured?  Yes  No | | |
| Does the Contractor require UPEI to have insurance? | | | | | Yes  No | | If yes**:**  Attach Request for Certificate of Insurance Form | | |
| **SECTION A: FEE FOR SERVICE AGREEMENT** | | | | | | | | | |
| Is the individual being contracted a UPEI employee? | | | | | | Yes  No | | | If yes**:** Contact Human Resources |
| *Procurement Requirements for Fee for Service and Construction contracts based on the value of the contract:* | | | | | | | | | |
| (1) **Fee for Service** | | (2) **Construction *(FM ONLY)*** | | | | | | **Confirmation of Procurement requirements** | |
| between $10,000 and $50,000 | | between $10,000 and $100,000 | | | | | | at least three (3) documented competitive quotes | |
| greater than $50,000 | | greater than $100,000 | | | | | | RFP/RFQ #: | |
| Requesting single/sole source in accordance with [*Procurement Policy*](https://files.upei.ca/policy/procurement_policy_admprognl0001.pdf) | | | | | | | | Submit [Non-Competitive Procurement Justification Form](https://portal.upei.ca/facultystaff/administrativeservices/ProcurementServices/Documents/Non%20Competitive%20form%20(Single%20or%20Sole%20Source).docx) | |
| **SECTION B: SERVICE AGREEMENT** | | | | | | | | | |
| For Academic Units – Is this a new Service? | Yes  No | | | If yes**:**  Please consult with your Dean and Finance and attach confirmation of their approval to proceed with offering this Service. | | | | | |
| **SECTION C: FUNDING AGREEMENT** | | | | | | | | | |
| Is this source of funding:  Federal  Provincial  Other | | | | | | | | | |
| Is this part of a UPEI project? | Yes  No | | | Project Name: | | | | | |
| Is there another party contributing funds to the same project? (*ie. matching funding*) | Yes  No | | | If yes**:** (a) Amount: $  (b) Other party(ies):  (c) Has another contract been submitted:  Yes  No | | | | | |
| Is UPEI contributing funds? | Yes  No | | | If yes**:** (a) Amount: $  (b) UPEI Account: | | | | | |
| **SECTION D: LEASE** | | | | | | | | | |
| ☐UPEI Space. Describe space:  ☐External Space. Where is the space located: | | | | | | | | | |
| **SECTION E: SECONDMENT AGREEMENT** | | | | | | | | | |
| ☐ UPEI Employee being seconded to external organization? **OR** ☐ External organization seconding an employee to UPEI? | | | | | | | | | |
| Is the position 100% seconded?  *(\*For (b) if additional space is required, please attach a separate document).* | Yes  No | | | If no**,** this is a Partial Secondment. Please provide the following:   1. Partial secondment percentage: % 2. \*Any particulars related to the partial secondment: | | | | | |
| **SECTION F: MOU, MOA or OTHER AGREEMENTS** | | | | | | | | | |
| If additional information or context would be of help in the review of this agreement, please advise: | | | | | | | | | |
| **SECTION G: AMENDMENT** | | | | | | | | | |
| Check all changes made and provide details: | | | | | | | | | |
| ☐ Date: | | | ☐ Other: | | | | | | |
| ☐ Value: | | |

If there is additional information that is not addressed in this form or you think it may be relevant to the contract review, please attach a separate sheet with the additional information. Additional information assists the individuals reviewing and approving contracts to make decisions more expediently. Thank you in advance for your work and diligence in this matter.