



Service Partnership Agreement

By and Between

Client

And

Finance and Administration Shared Services

Effective Date: July 1, 2020 – June 30, 2021

This agreement represents a Service Partnership Agreement (SPA) between Finance and Administration Shared Services (FASS) and **Client**, hereby referred to as the “client,” for the provisioning of administrative support to enhance and support departmental activities as outlined below. The elements of the service covered by this agreement include:

- Business Operations
- Human Resources
- Information Technology

Agreement Period

This agreement remains valid until terminated by either party or superseded by a revised agreement mutually endorsed by both parties. This agreement is valid from the effective date outlined herein. This agreement will be reviewed at a minimum once per fiscal year; however, in lieu of a review during any period specified, the current agreement will remain in effect. The agreement may be terminated by either party with 180-day notice. FASS agrees to take whatever means are necessary to fully transition functions back to the client or to whomever it designates before the termination date.

Client Responsibilities

- Adhere to all applicable federal, state, university, and shared services policies and procedures.
- Commit to building a collaborative environment working towards a solution based agenda.
- Commit to the utilization of FASS software for specific functions.
- Provide timely responses to requests for information.
- Use FASS provided forms and intake procedures for requests.
- Notify FASS of department-level updates that may affect this service partnership or procedures governing this agreement.
- Provide authentic and clear feedback for process improvement.
- Maintain all department-specific documentation.
- Provide training to internal staff regarding this agreement or process requirements outlined here or within specific FASS procedures.



FASS Responsibilities

- Meet response times associated with service-related incidents.
- Generate semi-annual reports on service levels for clients indicating KPI adherence.
- Train required client staff on appropriate service support tools.
- Provide appropriate notification and coordination to the business unit for all interruptions to service delivery.
- Facilitate all service support activities outlined in this document, including related contracts.
- Maintain current contact and escalation information.
- Communicate to all appropriate client staff regarding unit or university-wide incidents that may impact service availability.
- Represent the client as the relevant subject matter experts in support of services outlined in this document.
- Adhere to all federal, state and institutional policies and procedures
- Test results that indicate backup and data recovery commitments are met.

Approval

(By signing below, all approvers agree to all terms and conditions outlined in this agreement.)

Jon Marchetta

Director of Finance and Administration Shared Services

Name

Associate Vice President **Department**

Signature

Signature

Date

Date



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Service Definition, Prioritization and Response

Critical Definitions - What do these terms mean?

- **SPA** – Service Partnership Agreement, this document outlining FASS provided services
- **FASS** – Finance and Administration Shared Services
- **SME** – Subject Matter Expert, an individual who can authoritatively speak on a given subject
- **Client** – Unit, department, individual, or group receiving services from FASS
- **Program Management** – Identifies a responsible party for the direction and strategic decision for a particular program or service. The decision-maker on how the program or service is administered. In some cases state law, federal law, or institutional policy act as the program management for a service.
- **Program Support** – The technical and professional staff or contracts needed to properly execute the objectives of a program or service, as dictated by the program management.
- **Liaison** – The means of communicating between two different groups.
- **Service Request** – A submission of a request for support from any of the FASS business units which will be prioritized and responded to.
- **Incident** – FASS IT definition of a provided service that is deemed to be malfunctioning or unavailable.
- **Data** – A collection of information points (e.g. – an invoice was paid on 4/1/19).
- **Metric** – A comparison of data points (e.g. – an invoice that was paid on 4/1/19 was paid 5 days after receipt).
- **KPI** – Key Performance Indicator, a comparison of metrics against a target goal, used to provide indicators on service level and quality (e.g. – pay 95% of invoices within 7 days of receipt, the invoice paid on 4/1/19 met this KPI).
- **Success Measure** – A KPI for a particular service in this document.
- **Business Hours** – Typical business hours for support are **Monday-Friday, 8:00 AM - 5:00 PM**.

Service Definitions – How FASS Provides Services

- **Partner** – FASS acts as the client’s single point of contact and liaison with other UO departments to address the service request or incident. Other university units (non-client) act as the program support and program management (e.g. – University Support Services Requests).
- **Consult** – FASS acts as an SME for the client. FASS acts as the program support while other university units (non-client) act as the program manager. Final deliverables are the responsibility of the client (e.g. drafting a letter of expectations).
- **Coordinate** – FASS acts as an SME for the client. FASS acts as the program support while other university units (non-client) act as the program manager. Final deliverables are the responsibility of FASS (e.g. making travel arrangements for client staff).
- **Provide** – FASS provides end-to-end support of this service, acting as the program support while other university units (non-client) act as the program manager. There may be FASS specific criteria or procedures in support of this service (e.g. – annual budget process).
- **Manage** – FASS acts as both the program support and program management of a program or service. There may be FASS specific criteria or procedures in support of this service (e.g. – duty phone plan administration).
- **Maintain** – FASS acts as the program support for a service. Other university units (client or non-client) acts as the program manager (e.g. – computer-aided dispatch system support).



- ***Optional*** – A FASS Service marked *Optional* can be opted in or out by the client. All other services are core services and cannot be selected ala-carte (e.g. Stores Services).

Service Prioritization and Response

The following details the process utilized by FASS to prioritize incidents. Note the prioritization is determined by FASS in consultation with the user submitting the request.

Service Request Priority, Response, and Resolution – clients can expect an initial first response time for all service requests (issues) submitted via an approved submittal method within one hour of initiation. All requests enter the system as a STANDARD priority until they are assessed by a FASS representative for the following factors (not all-inclusive): who the requestor is, the overall impact of the issue, and the urgency of the issue.

If a specific due date is provided by the client, FASS agents will do their best to adhere to the request or negotiate a different time frame depending on the nature of the issue. If due dates are negotiated, those dates become the point of measurement for the resolution time. This due date supersedes the date as calculated using the target resolution time.

“VIP” users are typically Directors and Assistant/Associate Vice Presidents, or their equivalent org chart positions. Additional and/or specific employees may be assigned FASS “VIP” status if agreed upon by both FASS and the client. These agreements will be documented in a specific client service addendum.

PRIORITY	TARGET FASS SERVICE TIME*			
	FASS Information Technology <small>*resolution time</small>	FASS Human Resources <small>*resolution time</small>	FASS Business Ops- Purchasing <small>**based on PREQ response time</small>	FASS Business Ops- Accounting & Finance <small>*resolution time</small>
URGENT	2 hours	4 hours		8 hours
HIGH	1 Day	Targets dictated by actions required	Detailed PREQ (purchase request) response within 2 business days, target completion negotiated with the client based on need	Target dictated by actions required
STANDARD	3 Days			
MINOR	Target dictated by actions required			

*Resolution time does not include scheduled activities or waiting on the client and other UO support units. For example, if FASS HR is working with a client on a recruitment and a meeting is scheduled today for three days from now, the time from today to the time of the meeting is not included in the resolution time calculation. The total time for a service request will be available to the client review upon request and is the basis for some FASS success measures outlined in the Services Provided section.

**Response time is for PREQ requests made through Aim.

*References to days and hours refer to periods of time considered normal business hours, 8:00 AM - 5:00 PM Monday-Friday, University holidays excluded. Example: A High Priority FASS IT request submitted at 1:00 PM on Thursday will be considered late if resolved after 12:00 PM on Friday.



PRIORITY	GENERAL OVERVIEW OF SERVICE PRIORITY EVALUATION			
	FASS Information Technology	FASS Human Resources	FASS Business Ops-Purchasing	FASS Business Ops-Accounting & Finance
URGENT	<ul style="list-style-type: none"> • Work cannot be completed • Highly time sensitive • Damage, vulnerability, or cost is continually being incurred. • VIP user 	<ul style="list-style-type: none"> • Affects immediate job status • Same day employee pay requirements 	<p>General criteria used for target setting:</p> <ul style="list-style-type: none"> • Unplanned needs affecting immediate staff, faculty, and student safety. 	<ul style="list-style-type: none"> • The request comes from users with VIP status and turnaround requirements less than one business day.
HIGH	<ul style="list-style-type: none"> • A large number of staff are affected • Client unit mission is compromised • Service request scale escalation can be prevented by action • Work is significantly hindered 	<p>General criteria used for target setting:</p> <ul style="list-style-type: none"> • Unforeseen personnel action that must be processed immediately • Request comes from users with VIP status and has an immediate impact on their operation if action is not taken. 	<ul style="list-style-type: none"> • Damage or cost is continually being incurred. • Purchase is unplanned and reactive, and/or repair or replacement of damaged equipment or buildings critical for the function of the University • Purchase is routine and planned • Purchase is strategic or complex in nature with significant definition requirements and lead times. Can also be planned contract renewals. 	<p>General criteria used for target setting:</p> <ul style="list-style-type: none"> • Specific requested turnaround time. • Request is required to meet fiscal policies and/or deadlines.
STANDARD	<ul style="list-style-type: none"> • A moderate number of staff are affected • Work is being negatively affected, but still can be completed • Typical data requests 	<ul style="list-style-type: none"> • Request has been planned and a specific target date set • Request is in the planning phase with limited information or no requested timeline. 		<ul style="list-style-type: none"> • Request involves past-due or lost payments. • Request involves required payments or billings with a deadline • Request is exploratory or strategic in nature with flexible deadlines.
MINOR	<ul style="list-style-type: none"> • Minimal effect on work and/or the issue is only an inconvenience. 			

FASS Emergency Response

In the event of an emergency where critical support is required, FASS can provide immediate support:

1. During Business Hours, call 541-346-2455 for immediate connection to the FASS service team for SME connection.



2. During non-Business Hours, call 541-346-2232 for 24/7 IT support, for all other FASS support services call 541-346-2285 for connection to the Director of Finance and Administration Shared Services.

For non-business hours support, FASS will review any emergency calls with the requesting client after the event has been resolved in an effort for continual improvement. FASS may require an after-action report to be completed with the client.

University Policy and Initiative Compliance

The University will, from time to time, add, delete, or otherwise change policies, rules, regulations, and service levels that impact services and/or service levels provided under this SPA. FASS will, within a reasonable timeframe and with prior notice, adjust the services provided to conform to these changes. These changes may occur outside of the annual review process for this SPA. The SPA will be amended to reflect the service level change during the following review period.



SERVICES PROVIDED

BUSINESS OPERATIONS

1.0 Budget and Resource Planning Support

1.1 Budget Methodology

Services Provided	Success Measures
<ul style="list-style-type: none"> • Maintain the client’s annual financial plan. • Manage fiscal year close and open activities. • Provide indirect cost recovery (ICC) allocation . • Manage pooled cost analysis and allocation, such as training and equipment renewal. • Provide recurring allocations analysis. • Provide salary and benefits analysis and forecasting. • Consult on strategic initiatives allocation management requests. • Provide data entry for all budgetary data into the UO budget system. • Manage departmental budget training and operational budget guidance documents. 	<p>95% compliance with resolution targets</p> <p>Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey</p>

1.2 Resource Planning

Services Provided	Success Measures
<ul style="list-style-type: none"> • Consult on special analytical studies and presentations. • Consult on resource and management policy trends and prepare reports and recommendations. • Consult on financial asset and management issues. • Consult on planning strategies to pursue new resources for the department. • Coordinate restructuring strategies for existing departmental financial resources. 	<p>Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey</p>

1.3 Long Term Planning and Operational Capital Asset Planning

Services Provided	Success Measures
<ul style="list-style-type: none"> • Provide financial scenario analysis support, including best practice recommendations. • Provide financial and resource related policy analysis. • Consult on and recommend departmental resource priorities. • Coordinate planning of department managed provisions, and capital programs consistent with institutional resource priorities. 	<p>Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey</p>



2.0 Labor or Service Rate Development

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage rate policy development and implementation. • Coordinate the annual UO Fines and Fees process. • Coordinate recharge or internal rate review and approvals. • Coordinate the annual rate report. • Manage rate audits/internal quality reviews. • Consult on external and internal sales review, per department specifications. • Manage rate use training coordination and technical support. 	<p>Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey</p>

3.0 Informal Contract Support

Services Provided	Success Measures
<ul style="list-style-type: none"> • Coordinate Memorandum of Understanding (MOU), or informal contract management and organization. • Provide a review of established MOU's annually, or per established agreement review period. • Coordinate establishment of new internal or external agreements, in collaboration with UO Purchasing and Contracting services and the UO General Counsel. 	<p>95% compliance with response targets</p>

4.0 Accounting and Financial Support

Services Provided	Success Measures
<ul style="list-style-type: none"> • Provide an internal control structure for partner departments to ensure compliance with state, federal and departmental policies and procedures. • Coordinate annual spending plan process. • Manage a master schedule of fund availability. • Coordinate new project initiation/set-up or appropriations. • Coordinate annual departmental carryforward process and allocation. • Manage reconciliation services for appropriate accounts, funds, and supported systems. • Manage journal vouchers for internal charges to credit and debit expense indexes, including plant funds, as needed. Become the office of record for these transactions for audit purposes. • Coordinate shadow system data transfers periodically, as established by FASS IT and department. 	<p>Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey</p>



5.0 Forecasting and Reporting

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage monthly unit budgetary reports. • Manage monthly cash flow reports when requested and appropriate. • Provide cost analysis for departmental shadow systems. • Monitor accounts for emerging issues, statutory compliance, accuracy, and cash flow needs. • Coordinate and report on project funding as requested by the client. • Coordinate or provide ad-hoc financial reports, as requested. 	<p>Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey</p>

6.0 Accounts Payable, Billing and Accounts Receivable

Services Provided	Success Measures
<ul style="list-style-type: none"> • Coordinate internal billing services for departmental services. • Consult on administrative processing of departmental account receivables (AR) activities. • Coordinate event billing via approved departmental programs or tools. • Coordinate payment of all invoices associated with purchasing forms on records such as purchase orders, PCARD transactions, PSC, TSA, and other executed agreements per terms and conditions of the particular approved tool. • Manage PCARDS for departments and act as PCARD Custodian for all FASS PCARDS except those related to travel. • Coordinate paying all employee reimbursements according to university requirements. • Manage appropriate university budgetary approval of all payments. • Maintain guidelines and best practices for timely payment. • Ensure all approvals are in place, all budgets are active, and proper posting of vendor and internal codes per the University FIS guidelines. • Maintain all documents per the University Retention Policy. • Manage annual safety footwear or apparel programs. • Maintain the monthly phone stipend program. 	<p>95% payment within 45 days of vendor date</p> <p>Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey</p>

7.0 Purchasing

7.1 Requisitions and Requests

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage purchasing services, or all commodity and service requisitions and requests under \$25,000.00, using the most cost-effective means applicable and following university, state, and federal rules in a timely fashion that meets both client and FASS timelines and needs. • Consult with Purchasing and Contracting Services for all formal and informal procurements greater than \$25,000.00 and outside of FASS delegated authority. • Provide guidance during pre-requisition phase of projects, programs, and needs. This includes: <ul style="list-style-type: none"> ○ Consultation and approval of appropriate purchasing method. 	<p>95% compliance with response targets</p> <p>Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS</p>



<ul style="list-style-type: none"> ○ Review and ensure the use of any specific vendor requirements (QRF, UO-wide contract, etc.) for the procurement. ○ Review appropriate use of approved state, federal, and cooperative agreements approved for use by the University. ○ Vendor review and verification for compliance with UO, state, and federal policy. ○ Price verification for best university value ○ Specification review and consultation to ensure best practices in regards to transition into the best value contract. ○ Serve as primary liaison with Purchasing and Contracting Services (PCS) to ensure proper procurement procedures. ● Provide tools, storage, and methods of requisition that are compatible with systems in place. ● Provide data on historical purchases and market trends. ● Maintain training and communication methods that are compatible with systems in place. ● Maintain all purchasing records for audit purposes and record retention. ● Manage and process standard University of Oregon approved purchase orders following university, state, and federal rules under FASS delegated authority. ● Manage pooled duty phone device plans. 	<p>Client Satisfaction Survey</p>
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7.2 – Contracting Support (Less than 25,000 or within FASS delegated authority)

Services Provided	Success Measures
<ul style="list-style-type: none"> ● Provide general contracting services: <ul style="list-style-type: none"> ○ Ensure proper due diligence has been completed by the purchasing unit. ○ Ensure QRF involvement, when appropriate according to UO, state, and federal policies. ○ Ensure MWESB involvement, when appropriate according to UO, state, and federal policies. ● Provide full representation in all dealings with PCS on purchase orders and intake requirements. ● Maintain storage of all documents for the required retention program. ● Manage and act as primary liaison with vendors associate with the procurement. ● Maintain records for all purchase orders and contracts processed for the department. <p>PERSONAL SERVICES CONTRACTS:</p> <ul style="list-style-type: none"> ● Manage all requests for Personal Service Contracts (PSC) per University rules and using PCS template contract forms under \$25,000.00. ● Consult with UO Human Resources units to ensure compliance with UO labor agreements. ● Consult with other UO procurement entities to review opportunities for alternative procurement methods, such as the UO retainer program for consulting services. <p>TRADE SERVICES AGREEMENTS:</p> <ul style="list-style-type: none"> ● Manage requisitions and requests for Service Agreements using approved PCS template contracts and Purchase Orders under \$25,000.00. Become the office of record for this process. 	<p>95% compliance with response targets</p> <p>Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey</p>



<ul style="list-style-type: none"> Consult with other UO procurement entities to review opportunities for alternative procurement methods, such as the UO retainer program for construction services. 	
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7.3 Contracting Support (greater than 25,000 and outside of FASS delegated authority)

Services Provided	Success Measures
<ul style="list-style-type: none"> Consult in determination from requisition/request that a formal/informal process is needed. Partner with the client to determine the evaluation committee, contract requirements, and all other aspects of the process. Partner with PCS and vendors during the procurement process. This includes all posting and communication requirements per UO and PCS policies. Partner with PCS and intake all documents to process these requisitions/requests, and the steps required until contract execution, per PCS guidelines and policies. Consult on client specifications to ensure the best value contract for the University. Consult on recommendations and requirements regarding the procurement committee, scoring, and documentation of the process. Consult on the contractual funding plan. Maintain all documentation per retention requirements. 	<p>95% compliance with response targets</p> <p>Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey</p>

8.0 Stores Services (Optional)

8.1 – Inventory Management

Services Provided	Success Measures
<ul style="list-style-type: none"> Manage FASS and client-owned inventory in an organized storeroom management system. Manage controlling sales, receiving, and shelf item management system. Manage materials including order placement, receiving, stocking, and distribution, Maintain staging space for prioritized activities per departmental needs. Manage on-demand material pickup from local vendors for emergency or critical needs. Maintain the inventory value and perform an annual inventory check for reconciliation purposes. Manage appropriate separation of duties regarding ordering, receipt, and payment of deliveries. Manage will-call or delivery services that are scheduled within 24 hours of receiving and notification. Provide a daily delivery route, based on client delivery needs, Monday through Friday. 	<p>Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey</p>

8.2 – Surplus Asset Program Support

Services Provided	Success Measures
<ul style="list-style-type: none"> Coordinate with department disposal, recycling, or surplus of excess assets when requested. 	N/A



9.0 Campus Mail Services*

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage Campus Mail sorting, collection, and distribution for campus. • International and domestic shipping of FedEx, UPS, and USPS parcels. • Management of University's zip+4 mailing addresses. • Daily metering of outgoing first-class mail. 	N/A

*Campus mail services will be provided regardless of FASS support.

Human Resources

10.0 Recruitment

10.1 Recruiting

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage all recruitments within the HRIS system and manage all documents associated with recruitments. • Manage primary departmental contact for all recruitments for both applicants and division. • Consult on strategies for specific hiring needs, including recommending recruitment methods targeted to specific groups of candidates. • Manage budgetary allocation for the posting type. • Consult and process marketing including advertising and posting plan. • Consult with and advise hiring supervisor and hiring committees on recruitment best practices; committee composition; UO standards, compliance which includes a member of FASS-HR being a non-scoring member of all committees. • Consult with department leadership to evaluate the effectiveness of recruitment techniques and strategies. • Coordinate initial screening services of applicant pools with the search chair. • Manage all pre-employment screenings; reference checks work history, education, criminal history background checks, and any other required pre-employment testing. • Manage the offer process and partner with central HR to ensure internal and external equity. • Consult with hiring supervisor to establish a start date. • Manage new hire communications including a welcome letter, communications related to onboarding activities to new employees, and communications to other stakeholders as appropriate. 	90% recruitment completion (offer card issued or recruitment terminated) within 90 days (classified) and 120 days (unclassified) from requisition initiation, unique or identified hard to fill positions will be identified separately.*

* current unique or hard to fill roles are VIP designated positions and CJIS certification required positions.

10.2 Onboarding

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage onboarding checklists; including enrollment in appropriate orientations. • Manage new hire paperwork; including I-9, w-4, etc. 	Avg. 4.0 or higher (on 5 point scale) as



<ul style="list-style-type: none"> • Provide a supervisor checklist to assist with communication to new employees regarding job description, departmental expectations, required training, etc. Ensure HRIS system is updated with current position information. • Maintain recruitment files as the office of record. 	indicated on the FASS Client Satisfaction Survey
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11.0 Employee & Labor Relations

11.1 Performance Management

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage communication regarding evaluation due dates and overall completion rates. Collect evaluations, and track completion. • Maintain Officer of Administration files as the office of record. • Consult with supervisors or employees to resolve performance-based disagreements, providing coaching and feedback. • Consult with supervisors in the development of written performance standards and crafting constructive feedback. 	Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey

11.2 Consultation

Services Provided	Success Measures
<ul style="list-style-type: none"> • Provide supervisors information on how to constructively coach and focus attention on key aspects of employee behavior. • Provide supervisors and employees with additional human resources support when needed for various issues. • Consult with the client regarding policy, practices, and Collective Bargaining Agreement (CBA) interpretation. • Consult departmental or leadership teams on various initiatives, including strategic planning, projects, program development, and staffing initiatives. 	Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey

11.3 Investigations, Grievances, Dispute Resolution

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage investigations which ensure the preservation of confidentiality, sensitive materials and protection of the employee, managerial, and University rights. • Consult with the client to develop and maintain cohesive work units with climates of cooperation and collaborative problem solving by identifying and mediating minor disputes. • Consult with the client towards achieving objective resolution. • Consult with the client to identify core issues and conduct; follow up on recommended outcomes using disciplinary actions as appropriate. • Provide meeting facilitation and track documentation of outcomes, assisting the client with notifications to include disciplinary letters as appropriate. 	Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey



<ul style="list-style-type: none"> • Partner with University HR regarding implications of grievances and corresponding impacts of recommended resolutions. • Provide University representation during grievances, contract disputes, arbitrations, state or federal investigation or external legal challenges. • Consult with supervisors on strategies for handling complex situations. 	
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11.4 Employee Separation

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage employee separation process and documentation. 	N/A

11.5 Leave of Absence

Services Provided	Success Measures
<ul style="list-style-type: none"> • Provide initial intake and triage then refer to University HR. 	N/A

12.0 Payroll Administration

12.1 Payroll Processing and time entry

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage all payroll processes. • Manage, review, and audit of time submittals for employees. • Manage the entry of pay adjustments due to employment change actions (work out of class, temporary appointment, etc.). • Manage the entry of time records into Banner for payment processing. • Manage tracking, verification, and ensure accuracy of pay; differentials, overtime pay, etc. • Manage the upload of pay information into departmental systems for chargeback activities. • Consult with managers and supervisors on payroll best practices for compliance. • Provide training and updates on payroll policy. • Partner with University Payroll on complex pay issues. 	Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey

13.0 Organization Development & Training

13.1 Staff Engagement

Services Provided	Success Measures
<ul style="list-style-type: none"> • Consult with department leadership about engagement strategies and cross-departmental engagement opportunities. 	Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey



13.2 Training program coordination

Services Provided	Success Measures
<ul style="list-style-type: none"> • Provide consultation and support to the client for training and professional development opportunities. • Provide in-house training. • Provide logistics for training opportunities including facility selection, AV needs, and catering. • Partner with University HR to develop, design, and track professional development activities. • Provide support to business partners in the navigation of MyTrack. • Partner with other university resources external consultants, etc. to align department based initiatives to organizational initiatives and implement improvement strategies. 	<p>Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey</p>

14.0 Workforce Planning

14.1 Consultation

Services Provided	Success Measures
<ul style="list-style-type: none"> • Consult with the client leadership to find workable solutions for staffing issues (Return to Work, FMLA, Census), such as temporary assignments, work out of class, contract temp workers, workforce re-organizations and departmental transformations, etc. • Consult with the client on retention strategies which align the workforce with departmental objectives. • Consult with the client leadership on appropriate recognition strategies, in line with UO standards and collective bargaining agreements. • Manage staff development through mentoring, cross-training, internships, campus staff organizations, professional associations, committee and task force assignments, and skill assessment programs. • Consult with the client leadership regarding workforce planning through review and evaluation of forecasted workforce projections, historical trends, metrics, and KPI analysis • Partner with University HR, regarding complex disability management, workers compensation, and reduction in force issues. Partner with Safety and Risk Services to identify and find solutions to accommodate or to minimize employee injury or worker’s compensation issues. • Consult with the client leadership on position and pay actions such as equity reviews, reclassifications, and merit increases, etc. • Partner with University HR on appropriate compensation issues. 	<p>Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey</p>

14.2 Position Management

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage position description development and edit process. • Manage departmental position inventory. • Manage compensation and position adjustment forms. 	<p>Complete MyTrack submission of new and revised position</p>



	descriptions within 20 business days of department submittal to FASS.
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Information Technology

16.0 Relationship Management for Services provided by Central IS

Services Provided	Success Measures
<ul style="list-style-type: none"> • Provide overall relationship management for services provided by Central IS* • Partner with USS to assist in achieving its service level goals. • Accept escalation requests for requests initiated by FASS-support unit staff and assigned to USS resources for resolution. 	Outlined on page 20

* Reference for overall Transform IT/USS project: [Transform IT](#). Services provided by USS are listed here: [Service Catalog](#). USS Service Level Agreement: [USS SLA](#).

17.0 UO Network Wired and Wireless Local and Remote Connectivity

Services Provided	Success Measures
<ul style="list-style-type: none"> • Partner with the client for private network access provisioning, VPN requests, and other solutions that enable off-site access to network resources. • Provide relationship management for these services as provided by Central IS. 	Outlined on page 20

18.0 Shared File Server System Access Management, Backup, Recovery, and Education on Data Management Best Practices

Services Provided	Success Measures
<ul style="list-style-type: none"> • Consult and recommend on how to structure or re-structure shared file servers. • Provide shared file technical support to keep the information contained in the files accessible and secure. • Coordinate critical data storage and work to construct a backup and recovery scheme that meets the goals and objectives of the client. • Consult and train on best practices to meet client needs. • Provide relationship management for these services as provided by Central IS. 	Outlined on page 20



19.0 Support for non-Standard Productivity, Collaboration and Unit-Specific Software

Services Provided	Success Measures
<ul style="list-style-type: none"> • Provide, for the list of applications here: Supported Unit Software Titles, adequately patched and upgraded currently supported versions on client workstations as requested and approved by client approval processes. Note that some applications require a licensing or support fee as indicated on the page in the link. • Consulting services for the specification, request, acquisition, installation, and maintenance of software. 	Outlined on page 20

20.0 Security Best Practice Education and Training for End-Users

Services Provided	Success Measures
<ul style="list-style-type: none"> • Manage routine training and notification for end-users regarding email, portable devices, and online browsing safe practices. Part of this practice involves IT review and vetting of suspected “bad” emails and suspect sites encountered by end-user • Partner with the Information Security Office to keep abreast of current security matters. • Provide expertise and act as a single point of contact for Information Security policy and implementation. 	Outlined on page 20

21.0 Other Service and Applications

Services Provided	Success Measures
<ul style="list-style-type: none"> • Provide or manage support for the application at whatever level that the client and FASS IT care to negotiate. Agreed upon support will be documented in a specific addendum to this agreement. 	Outlined on page 20

Availability Restrictions

Standard [maintenance](#) periods as implemented by Central IS for services provided by Central IS. These include email, Banner, Remote System Access, and Shared File services.

During curtailment or closure of normal UO operations, FASS IT will continue to support those systems designated as mission critical UO systems only.

All systems require maintenance from time to time that renders them unavailable. FASS IT will work with the client to determine a recurring maintenance window that will minimize the impact.

Events outside the control of FASS IT may temporarily restrict meeting response times.

Exclusions

- Systems and software not covered by this or other in-force SPA’s.
- Equipment and software obtained outside of this agreement.
- BANNER Finance, HR, and IDR applications and system support beyond workstation set-up.



- Drupal or other web hosting or development.
- Network architecture and provisioning – these requests must go through NTS. FASS IT will broker conversations with NTS.
- Installation and configuration of software and hardware that is otherwise available as a service offered by Central IS. FASS IT will coordinate escalations with Central IS upon client request.

Service Assumptions

Assumptions related to in-scope services and/or components include:

- The client user base will remain within 5 FTE or 5% (whichever is greater) of current staff levels.
- Funding for major upgrades and service contract costs not defined in this agreement will be provided by the client and treated as a project outside the scope of this agreement.
- Communication and documentation of service changes are issued to all stakeholders before implementation.

Service Metrics

The following metrics will be established and maintained by FASS-IT to ensure optimal service provision to the business unit:

Metric	Definition	Success Measures
Service Request Initial Response Time	Initial response to a client-initiated request. Response may include notification of assignment to an agent or clarifying question sent back to the client.	90% responded to within one business hour of request.
Escalation Request Initial Response Time	Initial response to client-initiated escalation request. Response may include notification of assignment to an agent or clarifying question sent back to the client.	90% responded to within one business hour of request.
Service Request Resolution time	FASS IT resolution times by due date.	90% compliance within 1 business day of calculated or negotiated due date.
Client Satisfaction	Overall measure of client satisfaction with this service across service and escalation requests.	Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey



GENERAL SERVICES PROVIDED

22.0 Travel Coordination

Services Provided	Success Measures
<ul style="list-style-type: none">• Provide travel support including flight, transportation, lodging, and event reservations.• Provide Concur support.	Avg. 4.0 or higher (on 5 point scale) as indicated on the FASS Client Satisfaction Survey



Appendix – Service Criticality

The client determines Service Criticality. FASS IT provides multiple services to a broad set of clients and needs a mechanism to gauge their importance in relation to each other. The criticality designation thus helps determine the recovery sequence when outages occur that impact multiple services. If the client has multiple mission critical or business critical services, FASS IT will request that services within these categories be ranked.

The prioritization structure defined above is not the same as service criticality as defined here. For example, it is possible to have an incident occur that has a priority of STANDARD for a mission critical service. For example, if the client has determined that email is a mission critical service and an incident is reported whereby one user cannot access a particular mailbox, that incident will still be treated as a STANDARD request with a target resolution time of 3 business days. If, however, it is reported that the entire service is unavailable and there is another service entirely unavailable that has a lower service criticality designation, the mission critical service will be brought back into service first.

The following describes a structure for determining service categories and corresponding criticality of services for the client:

Mission Critical

A mission critical service requires continuous availability. Breaks in service are intolerable and immediately and significantly damaging. Availability required at almost any price.

Key characteristics of this type of service are:

- Generates revenue: customer of the client creates orders through the service.
- External customers are direct users of the services.
- Underpins the service the client provides to its customers.

The typical impacts of a service outage are:

- Inability to conduct business as usual.
- Damaging for the client's commercial reputation and credibility.
- Long-term outage threatens financial harm.

An example of a mission critical service is the point-of-sale terminals for the Duck Store.

Business Critical

A business critical service requires continuous availability, though short breaks in service are not catastrophic. Availability required for effective business operation.

Key characteristics are:

Indirectly affects the supply of client service to its customers.
Supports customer-facing activities

The typical impacts of a service outage are:

- Inability to answer respond to customer queries at a help desk.
- Long-term outage can significantly reduce company cash flow

An example of a business critical service is email.



Business Operational

Contributing to efficient operations but out of the direct line of service to the client.

Key characteristics of business operational:

- Internal users only

The typical impacts of a service outage are:

- Reduced efficiency and increased cost of operations

An example of a business operational service is web access.

Administrative Services

Services on the level of office productivity tools, required for business to operate. Failures are undesirable but do not affect clients and can be tolerated a little more. Cannot justify extreme additional expenses for higher availability.

Key characteristics:

- Internal users only

The typical impacts of a service outage are:

- Reduced individual performance and productivity

Examples of administrative services applications are desktop applications such as Microsoft Excel and Word.