

Purchasing Services
Personal Service Contracting Office

Announcement: State Mandated, Personal Service Contract Management Training Class.

What are Personal Services?

Personal services or consulting services, as they are commonly called, include a variety of professional and technical services that are purchased by the UW such as: organizational assessment, actuarial services, financial and economic analysis, environmental planning, management consulting, marketing services, needs assessment, quality assurance, research & scientific studies, statistical analysis, strategic planning, design and video production services just to name a few!

Background

In 2002, the Office of Financial Management (OFM), acting on legislative mandate, issued requirements to all state agencies, including higher education, regarding Personal Service and Client Service contracts. "Beginning January 1, 2004, no state employee may execute or manage personal service contracts or client service contracts unless the employee has completed the state certified training course. (RCW 39.29)"

Target Group

UW personnel who manage or execute personal service and client service contracts greater than \$4999.00 (per contract) must take the training provided by or approved by OFM. Managing these contracts, as defined by OFM, include staff who are responsible for the day-to-day activities of the contract and contractor, including providing technical assistance to the contractor, monitoring compliance with the contract terms and conditions, reviewing and approving invoices.

Training at the UW

Twice yearly, (spring and fall) UW Purchasing Services conducts training classes certified by OFM, that meets the mandatory training requirement for staff that manage or execute personal service type contracts. The three hour training is an introduction to statutory and regulatory requirements and how they apply to real life contracting situations at the university. This class covers the same basic elements as the overview class offered by OFM in Olympia, but in the UW half-day introduction version, there are fewer group exercises.

Class Objectives

Upon completion, participants should be able to:

- Understand the basics of contracting;
- Identify personal services contracts and distinguish them from other types of contracts;
- Understand the sole source & competitive procurement requirements for personal service contracts;
- Understand the OFM filing requirements for personal service contracts.

Class Information:

Date:	Tuesday, November 17, 2009
Time:	9am - Noon
Location:	Ethnic Cultural Center 3931 Brooklyn Ave NE., Black Room Seattle, WA 98195
<u>Registration Required!</u>	
Email:	jessic@u.washington.edu Enter "Contract Training" in subject field
Cost:	Free

FAQS

- o You are not required to take the class more than once. (Whew!)
- o If you opt to take this class directly from OFM, (at another location) please notify us via email.
- o Subcontracts, which are processed by Mike Blackwell, Subcontract Administrator, through the Office of Sponsored Programs are *exempt* from the OFM training requirement.

Interested in Attending Training Classes Offered by OFM?

The Office of Financial Management in Olympia offers Personal Service and Client Service training classes along with many other types of free courses. If you have questions regarding OFM's courses, please contact OFM directly via the contact information provided on their website. <http://www.ofm.wa.gov/default.asp>

Interested in Knowing More about UW Purchasing?

Please visit us on the web at <http://www.washington.edu/admin/purchstores/>

If you have any questions about the mandatory personal service contract training requirement or any other personal service related topic, please contact us at the UW Purchasing Department, Personal Service Contracting Office. Thank You!

CONTACTS

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