

Training Services Agreement

Instructions for Use

STEP 1

- a. Confirm that neither the Trainer, nor anyone working with or for the Trainer to provide the Services, is a current STC employee or a former STC employee who left STC within 12 months of the Effective Date of the Agreement. If so, STC cannot enter into a contract with the Trainer.
- b. If you have not already done so, reach an understanding with the Trainer on the substantive terms of the Agreement such as fees, expenses, dates, and scope of work and obtain all of the personal information needed from the Trainer in order to complete the Agreement.
- c. If the Agreement is with a company rather than with an individual, does STC expect a specific person or persons to provide the Services? For example, if the Agreement is with Best Training Services, Inc. who employs Ms. Jane Doe as a trainer and if STC specifically wants Ms. Doe to provide the training as a condition of the Agreement, then Ms. Doe must be listed in the “Representatives” section of Attachment A.
- d. Fill out the form Agreement including:
 - The Effective Date of the Agreement.
 - The full legal name of the Trainer as it appears on the W-9 form. (If the Trainer is a company rather than a person, the name of the company should be listed.)
 - The contact information for STC and the Trainer in Section 11.
 - If the Services will take place over a period of time, in Attachment A write in the Commencement Date and the Termination Date; if the Services are being provided on a single day, use the space provided for the Engagement Date; mark “NA” in the space(s) that do not apply.
 - In the space provided in Attachment A, describe the Services the Trainer will provide including, if applicable, any deliverables the Trainer has agreed to produce.
 - Information concerning the payment of fees and expenses, if any, in Attachment A.
 - Information to complete the signature lines.

STEP 2

- a. Send the Agreement to Todd Nelson in the Purchasing Department for his review, possible modification, and approval (tnelson2@southtexascollege.edu).
- b. Ask the Trainer to provide a W-9 and to complete the two forms that are attached as exhibits to the Agreement: Criminal History and Conflict of Interest. (Note: If the Trainer has already provided any of these forms including the W-9 within the fiscal year for which the Agreement is being entered into, the forms do not need to be completed again.)

STEP 3

- a. Receive the final, approved form of the Agreement from the Purchasing Department.
- b. Send the Agreement to the Trainer for signature. **Note:** The Trainer must also initial Attachment A. (You may send the Agreement in electronic form so that the Trainer can print, sign and return the original by mail. If time is of the essence, the Trainer can scan the signed Agreement and return it by email for processing by STC and then put the original in the mail. Normally there is no need to use an overnight courier.)
- c. Obtain signatures from the person(s) in your department who are required to sign the Agreement pursuant to internal departmental requirements.
- d. Return the fully signed Agreement to the Purchasing Department along with the W-9 and the other two forms (Exhibits 1 & 2) at which time the Agreement will be processed for Dr. Reed's signature, if necessary.
- e. A scanned copy of the fully executed Agreement will be sent to the Trainer as an email attachment. (If the Trainer would like to have a fully executed original Agreement, he or she should print, sign and return two copies; STC will sign both sets and mail one fully executed original to the Trainer.)