

## BUSINESS CONTRACT REQUEST FORM

PARTIES TO THE AGREEMENT	
<b>Trustees of the California State University</b> (on behalf of CSU, Stanislaus)	<b>Other Party to Agreement</b>
Initiating Unit:	Legal Name:
Stan State Contact Person:	Other Party's Contact Person:
Campus Address:	Mailing address:
Phone Number:	Phone Number:
FAX Number:	FAX Number:
E-mail:	E-mail:
Is the Other Party: a CSU employee? a near relative of a CSU employee? a business owned/controlled more than 10% by a CSU employee or a near relative of a CSU employee? <span style="float: right;">Yes    No</span>	
EXPLANATION	
Explain the nature and purpose of the contract/agreement:	
Describe how this contract/agreement will benefit the University or is related to the University's mission:	
TERM AND FINANCIAL INFORMATION	
Period of Contract/Agreement:	Will generate    Revenue    Expense
From: _____ To: _____	Total Amount \$ _____.
If contract/agreement will generate University revenue, indicate the complete chart string into which the revenue will be placed: _____	
If contract/agreement will entail University expense, indicate the complete chart string to be charged <u>and</u> associated requisition #: _____	
APPROVALS	
Unit Head:	Budget Approval*
Signature: _____	Signature: _____
Title: _____	Title: _____
Date: _____	Date: _____
* Generally a VP but may vary by department	

## Purpose of the Business Contract Request Form (BCRF)

The purpose of this Form is:

- to provide the contracting office, Procurement & Contract Services (P&CS), with information to be used to negotiate and draft a business contract/agreement, and
- to ensure that necessary approvals have been obtained before the contracting office begins negotiations or drafting of a business contract/agreement.

THIS FORM IS NOT A CONTRACT, but the information provided may be used by Procurement & Contract Services to prepare a formal contract.

The Form is to be completed by the department/unit requiring the agreement (the Initiating Unit). The Initiating Unit is responsible for providing the requested information and for obtaining the required signatures.

About the Signatures:

- Unit Head – Reviews the Form and signs it to show approval of the terms of the proposed agreement which are described on the form – including the work to be done, the time frame and the budget amount.
- Budget Approval – Generally, the approver is the VP, but this may vary by department. The approver ensures that funds are budgeted for the proposed contract and provides the chart string information. The approver signs the Form to show approval of the budgeted amount and funding source.

The contracting office, Procurement & Contract Services, will review the BCRF, and if necessary, will request additional information from the Initiating Unit.

## Guidelines for Statements of Work

Below are some basic guidelines on information to provide to P&CS for Statements of Work. Provide as much information as possible. P&CS and/or a bid process can help "fill the gaps".

- Background – Provides CSU/campus background as well as background information related to the services being requested.
- Purpose – The specific need being requested. What does the contractor need to do?
- Contractor Responsibilities – What specific tasks, tools, and related items (data, equipment, connections, etc.) will the contractor be responsible for? What skillset and subject matter expertise will be required?
- CSU Responsibilities – What specific tasks, tools, and related items (data, equipment, connections, etc.) will the CSU/campus be responsible for? What skillset and subject matter expertise will be provided by the CSU/campus?
- Third Party Interactions – Will there be any required interactions with third parties to provide these services? If so, list the parties, their specific required involvement, and the potential nature of interaction agreements needed.
- Requirements Documents – Are there any specifications, drawings, etc. required to provide these services? If so, provide these documents.
- Deliverables – What tangible products (reports, finished goods, training, etc.) must the contractor deliver?
- Timelines – What will be the timeline of the project including milestones for deliverables and or specific achievements?
- Compensation – How much (rate, not-to-exceed) and when (hourly, as a lump-sum, when milestones are hit, etc.) will the contractor be paid? At early stages, this could just be the pricing models we may be willing to accept.
- Ownership of Work Product – Who will own the final deliverables?