

CONTRACT REVIEW REQUEST INSTRUCTIONS

Overview

The Contract Services Department is responsible for reviewing and approving all contract terms on behalf of the University to ensure compliance with law, policy, and advice of counsel, while pursuing the best interests of the institution. Contracts are required for any purchase, transaction, or relationship in which the University takes part in any capacity that may require expenditure of funds or expose it to risk. If you are submitting a Requisition to Procurement for this transaction, it is unnecessary for you to submit this form; Procurement will seek review. While Contract Services should review every agreement the University enters into with another entity, this does not address any other requirements that the University or your department may impose.

**NOTE: ONLY DEPARTMENTS TAKING RESPONSIBILITY FOR THE RELATIONSHIP MAY
SUBMIT A CONTRACT REVIEW REQUEST.**

The University is an instrumentality of the Government of the State of California delegated limited authority to contract on its behalf, and further constrained by law, regulation, and public policy. Please do not direct students to this form. California State University operational policy requires that certain preliminary matters must be addressed prior to entering into any contract with a third party. By submitting a Contract for review, you are representing that these matters have been adequately addressed and approved by authorities within your Department.

The Contract Review Request webpage can be accessed at <https://csulb.teamdynamix.com/TDClient/1993/Portal/Requests/ServiceDet?ID=51981> via link from the CSULB Contract Services website. The next step is to complete the Form.

Contract Review

Processing Step / Field Name	Screenshot / Description
Title	The Title field will be used to organize requests, and a portion of the Title will appear in the subject line of email correspondence related to your request. Please include the name of the entity with whom we will contract and a brief indication of the nature of the contract at issue.
What assistance are you seeking from the Contracts Services office?	The Contract Services office can assist you in a number of ways. You may select all applicable services requested for your contract.
Signature	Signature entails a request that an authorized representative of the University execute an agreement on your behalf.
Contract Review and Feedback	Contract Review and Feedback is appropriate in cases of preliminary review to evaluate the rights and obligations attendant to a relationship with a third party, comparing vendor offerings, or the like. Departments will sometimes request review and feedback to shed light on the nature of contract terms. Feedback can

	be provided in writing, or a meeting can be scheduled to discuss if indicated in the 'Additional Relevant Information' field at the end of the form.
Redlines	Redlines can be requested when we are in the process of negotiating the terms of a contract for execution. Contract Services will revise and comment on an agreement to bring it in line with our legal obligations, policy obligations, and best practices recommended by the Chancellor's Office and Office of General Counsel. These redlines can be provided to the party with whom we are contracting for their consideration and response as we move toward mutually agreeable terms.
Assistance in Negotiation of a Contract Relationship	Assistance in Negotiation of a Contractual Relationship can be requested when redlines and the CSU General Provisions have already been furnished to the party with whom we are contracting, and further discussion is required with their representatives or counsel. Contract Services personnel can join you to engage in those discussions and help move the parties toward mutually agreeable terms.
Construction of a New Contractual Relationship.	Construction of a New Contractual Relationship should be indicated where no contract exists but your Department would like to have one drafted and revised in conjunction with persons most knowledgeable within your Department and the party with whom we are contracting to establish the terms of the arrangement.

CSULB Contacts Details

First we ask that you provide some information about who is submitting the request at hand, the Department making the request, the person most knowledgeable who might be able to answer questions necessary to move forward, and the person who provided approval pursuant to University and Department policy.

Processing Step / Field Name	Screenshot / Description
Requestor	<p>The person filling out the form on behalf of the requesting Department. Required.</p>
Approver	<p>The person with sufficient authority within the requesting University Department, typically Level 4 Signing Authority.</p>
Contact	<p>The person most knowledgeable within the University Department who can answer questions and resolve problems should they arise.</p>
Department	<p>Determined by the selected Requestor.</p>

Entity Details

Contract Entity

A Contract is intended to establish rights and obligations based on mutual commitments, and allocate responsibilities and liabilities related to the relationship between two entities, allaying concerns on both sides and simplifying resolution of any dispute that might arise in the future. To ensure that these obligations and commitments are enforceable under law, and to ensure that you know with whom you are entering into this proposed relationship, we ask that you clarify with your contacts with the organization the **legal name and address** of the entity with which we will be contracting and who has the power to bind that entity by signing the contract. This information can be verified with the office of the California Secretary of State via its [Business Search portal \[https://www.sos.ca.gov/business-programs/bizfile/search-online\]](https://www.sos.ca.gov/business-programs/bizfile/search-online).

Processing Step / Field Name	Screenshot / Description
Contract Entity	<p>Provide the details of the legal entity.</p> <div data-bbox="483 779 1421 1360"><p>Contract Entity</p><p>Please provide the details of the legal entity with whom we are contracting for the purposes of notice under the agreement or subsequent legal action, should either become necessary.</p><p>Entity Name *</p><input type="text"/></div>

Contract Entity Contact

While the relationship with this entity belongs to your Department and we hope to simplify maintenance of the relationship by leaving responsibility for correspondence with your Department, information on your **Primary Contact** can be useful to Contract Services if we need to verify details, negotiate changes to the agreement, or address matters related to the program when the primary internal stakeholder is unavailable. Further, this information could be helpful to reengage an entity in the future or identify parties responsible for representations made by the entity.

Processing Step / Field Name	Screenshot / Description
Contract Entity Contact	<p>Provide the details of your primary point of contact at the contracting entity.</p> <div data-bbox="483 283 1421 804" style="border: 1px solid black; padding: 5px;"> <p>Contract Entity Contact</p> <p>Entity Contact Name *</p> <input type="text"/> <p>Entity Contact Department *</p> <input type="text"/> <p>Entity Contact Title *</p> <input type="text"/> <p>Entity Contact Email *</p> <input type="text"/> <p>Entity Contact Phone *</p> <input type="text"/> <p>Other Parties ⓘ</p> <p>Please list any other relevant entities, whether Parties to the agreement, student participants, third-party beneficiaries, or involved in some other way.</p> <input type="text"/> </div>

Contract Information

This section of the form will request general information about the agreement you seek to put in place, including **Contract Type**, a general description of the **Purpose of the Contract**, and other information that affects the responsibilities of the University and the Department seeking to establish the contractual relationship. Please answer all questions to the best of your knowledge. If you do not know the answers, please investigate before submitting to ensure that all your answers are accurate, as this information has substantive impact on the course of action required by law, regulation, CSU policy, and University policy.

Processing Step / Field Name	Screenshot / Description
Contract Type	<p>This field contains a drop-down menu with choices for types of contracts. If none of the choices provided apply, please select "other."</p> <div data-bbox="345 1423 1284 1497" style="border: 1px solid black; padding: 5px;"> <p>Contract Type *</p> <input type="text" value="Start typing..."/> </div>
Purpose of Contract	<p>Provide a description of the purpose of the contract, being as specific as possible.</p> <div data-bbox="345 1581 1284 1770" style="border: 1px solid black; padding: 5px;"> <p>Purpose of Contract * ⓘ</p> <p>For example, purchase of specific goods, establishment of relationship for student fieldwork placement, facility rental, specific student group participation in a specific event, procuring professional services of specific type to address a specific issue, et cetera. Please be as specific as possible.</p> <input type="text"/> </div>
Relevant Dates	<p>Optional. If you believe that any of this information will be useful to scheduling or providing review, please check boxes associated with the dates you intend to provide and fill out associated date fields.</p>

	<div style="border: 1px solid black; padding: 5px;"> <p>Relevant Dates</p> <ul style="list-style-type: none"> <input type="checkbox"/> Date of Expiration of Prior Agreement <input type="checkbox"/> Date of Expiration of Existing Agreement <input type="checkbox"/> Date Transaction Initiated <input type="checkbox"/> Date of Event <input type="checkbox"/> Date of Deadline for Submission <input type="checkbox"/> Date of Deadline for Booking <input type="checkbox"/> Date of Deadline for Quote Discount <input type="checkbox"/> Date of Final Review </div>
<p>Yes or No Questions</p>	<p>Answers to these questions have substantive impact on the course of action required by law, regulation, CSU policy, and University policy.</p> <p>Perform an investigation and discuss with participants before answering the questions to ensure all answers are accurate.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Does this contract entail the University spending funds? *</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Has an agreement of this type been entered into in the past?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Does this contract involve appreciable risk to staff, students, faculty or property, or require insurance coverage? *</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Does this contract entail purchase of software or hardware that creates, stores, or transfers digital information? *</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Does this contract entail international activity? *</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> </div>
<p>Additional Relevant Information</p>	<p>Please use this field to include any relevant information not provided elsewhere on the form, or make additional requests.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Additional Relevant Information</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div> </div>
<p>Priority</p>	<p>Contract Services is committed to meeting the needs of the University and each of its Departments in a timely fashion. Information on the priority of each request can help inform that process. Typically, we can provide initial review and feedback with redlines within 2-4 weeks of submission, but negotiation of terms and execution of agreements may take significantly longer depending on the subject of the agreement, the negotiating posture of the vendor, use of subcontractors, necessary approvals, heightened demand for services within the University, availability of vendor legal resources, and other factors. We would appreciate your anticipation of your Department’s needs to plan submission of contracts for review well in advance of deadlines in order to accommodate necessary processes and potential challenges that may arise.</p> <p>Use the Priority field to communicate how quickly you need a response.</p> <p>Emergency – Initial turnaround in 6 Business days High – Initial turnaround in 7 to 14 Business days Medium – Initial turnaround completed within 30 Business days Low – Initial turnaround completed within 45 Business days</p>

	<p>Priority ⓘ</p> <p>Contract Services is committed to meeting the needs of the University and each of its Departments in a timely fashion. Information on the priority of each request can help inform that process. Typically, we can provide initial review and feedback with redlines within 2-4 weeks of submission, but negotiation of terms and execution of agreements may take significantly longer depending on the subject of the agreement, the negotiating posture of the vendor, use of subcontractors, necessary approvals, heightened demand for services within the University, availability of vendor legal resources, and other factors. We would appreciate your anticipation of your Department's needs to plan submission of contracts for review well in advance of deadlines in order to accommodate necessary processes and potential challenges that may arise.</p> <p>Emergency – Initial turnaround in 6 Business days High – Initial turnaround in 7 to 14 Business days Medium – Initial turnaround completed within 30 Business days Low – Initial turnaround completed within 45 Business days</p> <p>Medium</p>
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Attachments Please do not forget to attach relevant document(s).

Contract Services will review and respond to requests in the order received, absent strong evidence of the necessity to delay other requests to service yours. This can usually be accomplished within two to four weeks, but may take longer depending on the time of year, the nature of your request, and other factors beyond the control of our personnel. We appreciate your patience and understanding.

Contact Contract Services If you need assistance with submitted requests, reply to the automated emails from Contract Services, or email FM-ContractServices@csulb.edu.