

AFFILIATION AGREEMENT 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. Pursuant to CSU policy and an Executive Order from the Office of the Chancellor, contracts are required for any student placement in which the University takes part in any capacity that may expose it to risk. While Contract Services should review every agreement the University enters into with another entity, this is not necessary for Affiliation Agreements based on the standard template developed for University use, accessible through the CSULB Contract Services website. Any modification to this template or agreement requiring the use of an affiliate's contract terms requires review, negotiation, and approval by Contract Services. While Contract Services' review is a necessary part of the process of establishing a relationship with a third party for student fieldwork placement, it does not address any other requirements that the California State University system, CSU Long Beach, or your Department may impose.

Note: Only Staff or Faculty in the Academic Department taking responsibility for the relationship may submit an Affiliation Agreement Review request.

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.

- CSU Executive Order 849 requires that we have written agreements for these programs specifying minimum insurance requirements and indemnity language.
- CSU Executive Order 1064 establishes responsibilities of the University with regard to Student Internships. Policy can be reviewed at <https://calstate.policystat.com/policy/6591275/latest>.
- Chancellor's Office has promulgated guides, checklists, rubrics, and other resources for Departments and Faculty managing service learning programs that can be found at <https://www.calstate.edu/impact-of-the-csu/community/center-for-community-engagement/Pages/csu-resource-guide-for-risk-reduction.aspx>.

Consult with leadership within your department to understand their processes and learn how they meet these requirements.

The Contract Review Request webpage can be accessed at this address [<https://csulb.teamdynamix.com/TDClient/1993/Portal/Requests/ServiceDet?ID=52013>], or via link from the CSULB Contract Services website. The next step is to complete the Form.

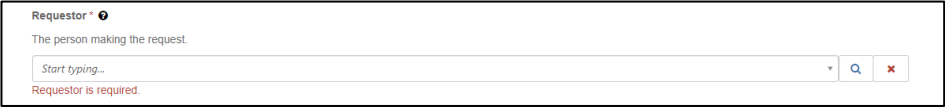
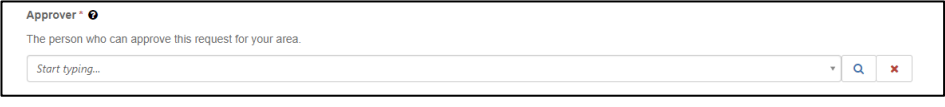
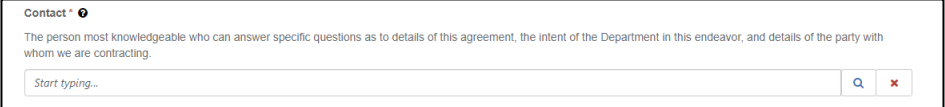

Contract Review

Processing Step / Field Name	Screenshot / Description
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Title	The Title field will be used to organize requests. Please include the name of the entity with whom we will contract and a brief indication of the nature of the contract at issue.

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.</p> 
Approver	<p>The person with sufficient authority within the requesting University Department, typically with Level 4 Signing Authority. For further clarification, please refer to the Delegation of Authority for the campus.</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. This is important for any relationship between business entities, but is of far more significance when inexperienced students are placed in the control of third parties without the usual protections employees enjoy. 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
<p>Contract Entity</p>	<p>Provide the details of the legal entity.</p> <div data-bbox="483 842 1421 1423" style="border: 1px solid black; padding: 5px;"> <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"/> <p>Entity Street Address *</p> <input type="text"/> <p>Entity Street Address Line 2</p> <input type="text"/> <p>Entity City *</p> <input type="text"/> <p>Entity State *</p> <input type="text"/> <p>Entity Postal Code *</p> <input type="text"/> <p>Entity Country *</p> <input type="text"/> <p>Entity Website *</p> <input type="text"/> </div>

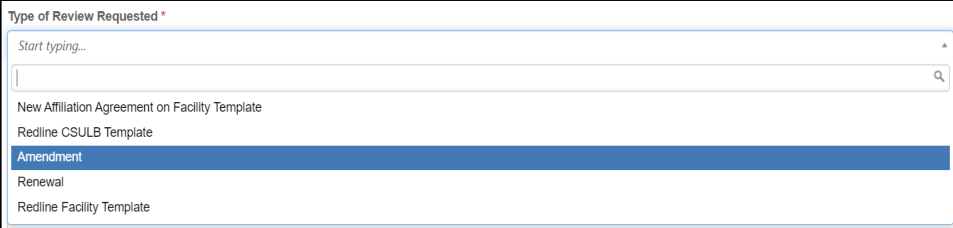
Contract Entity Contact

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, add additional CSULB departments to the agreement to provide access to these opportunities to a wider range of students, 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 with the contracting entity.</p> 

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
What assistance are you seeking from the Contracts Services office?	<p>The Contract Services office can assist you in a number of ways. You may select all applicable services requested for your contract.</p> 
New Affiliation Agreement on Facility Template	<p>Construction of a New Affiliation Agreement on Facility Template should be indicated where no contract exists and your proposed affiliate would like to use their agreement as a starting point, as is the case with many healthcare or public organizations. Contract Services will review their proposed agreement and revise in consultation with persons most knowledgeable within your Department and then with the party with whom we are contracting to establish the terms of the arrangement.</p>
Redline of CSULB Template	<p>Redline of CSULB Template should be selected in cases where the proposed affiliate is willing to begin negotiating from our standard agreement, but has requested</p>

	changes be made. Contract Services will review the requested changes and advise if they can be accepted, make counterproposals for language that might accommodate the proposed affiliate's requests, or inform you that their changes cannot be accommodated and the reasons for that position.
Amendment	Select Amendment if your department or your affiliate would like to make modifications to the obligations created by an existing agreement that has already been executed by both parties by executing a supplemental agreement.
Renewal	Renewal should be selected where there is an existing agreement in place between the parties that is going to expire, and both parties would like to continue the relationship without modifying the obligations.
Redline Facility Template	Redline Facility Template should be selected in cases where the proposed affiliate has an existing agreement that began with their own agreement and further revisions are necessary based on evolving Department needs, University needs, or the proposed affiliate's needs. Contract Services will review the agreement, consider the requests of the Department and the Affiliate, and make necessary changes for the review of the proposed affiliate.
Purpose of Contract	Provide a description of the purpose of the contract, being as specific as possible. <div data-bbox="459 741 1411 936" style="border: 1px solid black; padding: 5px;"> <p>Purpose of Contract * </p> <p>For example, undergraduate student fieldwork placement, graduate fieldwork placement, facility use, specific student group participation in a specific event, et cetera. Please be as specific as possible.</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div> </div>
Has an agreement of this type been entered into in the past?	This information will give us the opportunity to determine if we already have an agreement in place with this entity, or consider what terms had been negotiated previously to inform the expectations of the University in this case. If you do not know, please answer no.
Relevant Dates	Optional. If you believe that any of this information will be useful for scheduling or providing review, please check boxes associated with the dates you intend to provide and fill out associated date fields. <div data-bbox="459 1236 1398 1438" style="border: 1px solid black; padding: 5px;"> <p>Relevant Dates</p> <p><input type="checkbox"/> Date of Expiration of Prior Agreement</p> <p><input type="checkbox"/> Date of Expiration of Existing Agreement</p> <p><input type="checkbox"/> Date Transaction Initiated</p> <p><input type="checkbox"/> Date of Event</p> <p><input type="checkbox"/> Date of Deadline for Submission</p> <p><input type="checkbox"/> Date of Deadline for Booking</p> <p><input type="checkbox"/> Date of Deadline for Quote Discount</p> <p><input type="checkbox"/> Date of Final Review</p> </div>
Were they offered the CSULB template?	The standard template for Affiliation Agreements was developed to meet the minimum requirements of such an agreement in accordance with law, policy, and advice of counsel while not burdening either party with unnecessary obligations that may cause concern for affiliates. We would always prefer that departments attempt to develop relationships with affiliates based on this agreement, so ask that you present affiliates with this template before proceeding to review and negotiation of new contract terms.
Additional Relevant Information	Please use this field to include any relevant information not provided elsewhere on the form, or make additional requests. <div data-bbox="459 1808 1398 1955" 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>Options include:</p> <ul style="list-style-type: none"> 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

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. 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.