



# CONTRACT REQUEST

Date \_\_\_\_\_ Requestor \_\_\_\_\_  
Phone Number \_\_\_\_\_ Email \_\_\_\_\_  
Account Number \_\_\_\_\_ Account Name \_\_\_\_\_

## Contractor Information

Contractor's Legal Name (Including proper suffix, such as Inc., LLC, LP)

\_\_\_\_\_

Contractor's Mailing Address

Physical \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Email \_\_\_\_\_

## Scope of Services

### Goals

- Describe what will be achieved with this contract (overall outcome that will be accomplished after services are finished).
- What end results will occur after the Contractor's work is completed?

## **Objectives**

- Briefly describe the specific things you will be doing to achieve the goals listed above. Ex: Conducting a workshop for..., Conducting a training course for..., Creating curriculum plans for a program, Hosting an event to..., etc.).
- Use the SMART process: **S**pecific, **M**easurable targets, **A**ggressive but Attainable, **R**esult-oriented, **T**ime-bound.
- Sample opening statement: To achieve the goals listed above, the following objectives will be met:

## **Deliverables**

- Describe the product / work / services that you want the Contractor to provide.
- Include specific timeline schedules, as applicable, so the Contractor is aware of your expectations.
- List the specific tangible or intangible service that must be provided to accomplish the objectives listed above.
- Sample opening statement: To accomplish the objectives listed above, the Contractor will provide the following deliverables:

## **Performance Measures**

- Describe the criteria you will use to rate the performance of the Contractor, (how you will be judging their work). The criteria will vary based on the type of services being provided, but some examples are listed below (modify the example to fit the services that will be provided by your Contractor).
  - Professionalism with College Personnel and Students
  - Prompt Arrival
  - Ability to Engage Participants
  - Relevancy of Subject Matter
  - Knowledge of Subject Matter
  - Communication Skills
  - Quality of Audio Distribution (for Contractors using a PA system)
  - Ability to Meet Specified Deadline
- Criteria should be a quantifiable outcome used to measure performance. Criteria should be measurable and time bound
- Sample: Contractor's performance will be measured on criteria such as:

## **Monitoring Plan**

- Describe how the Contractor's performance will be monitored and reported.
- Specify how often you will monitor the Contractor's performance, and how the performance data will be verified to ensure it is accurate.
- The monitoring plan will vary based on the services being provided, but some examples are listed below (be sure to modify the examples below to fit the services being provided by your Contractor).
- Include the name and title of person responsible for monitoring the contract services. This person will be responsible for observing the services as they are provided, and determining whether the services are meeting the needs of the program and Foundation.
- Sample: The Contractor's performance will be monitored and reported as outlined below.
  - Sample Plan A: Name, Title of person responsible for monitoring contract services, will meet with Contractor before the event to recap and ensure the deliverables are provided satisfactorily and the intended objectives are met. Surveys will be distributed to all

participants during the event and completed surveys will be evaluated to determine the overall satisfaction of the services provided by Contractor.

- Sample Plan B: A weekly report summarizing the services delivered will be prepared by the Contractor and submitted to Name, Title of person responsible for monitoring contract services. The report will be analyzed for accuracy and for confirmation that services are being provided as intended.

**Other Terms**

**Payment Amount**

The maximum amount to be charged by the Contractor \$ \_\_\_\_\_

**Travel and Related Expenses**

Does the maximum amount to be charged include travel and other expenses?    YES    NO

*Please note that if travel and other expenses are paid separately, they will be reimbursed in accordance with and within the limits of the Foundation's disbursement policy.*

**Payment Schedule**

- Single Payment upon completion of services and proper invoicing
- Other – Please specify schedule and payment terms/amounts below

**Invoice Address** The fund requestor or administrator's BRCC mailing address

Physical \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Email \_\_\_\_\_

**Payment Request**

Fund administrators will be responsible for requesting contract invoice payment by completing a Foundation Disbursement Request Form. The invoice and supporting documentation that verifies deliverables and performance requirements were met must accompany the request.

What supporting documentation will be provided?

**Contract Dates**

- Start Date \_\_\_\_\_
- End Date \_\_\_\_\_

**Approval**

I approve of the contract terms and conditions outlined in this request.

**Requestor**

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**Fund Administrator**

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**STEPS TO CREATE A CONTRACT**

- Submit request form to the Foundation Director of Finance and Operations.
- A draft contract will be created and circulated for final approval.
- Once approved, the foundation will obtain signatures on the final contract.