Step 1: Approval to negotiate a new agreement or renew an existing agreement:

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Name** | **Initials** | **Date** |
| Department Chair/Director |  |  |  |
| Dean/AVP/Associate Provost |  |  |  |
| Vice President/Provost |  |  |  |

Provide a short summary explaining the purpose of the agreement and the service provided to the university.

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|  |

**Contract information:**

|  |  |  |
| --- | --- | --- |
| **Vendor Name** |  | |
| **Vendor POC Name** | **Email** | **Phone** |
|  |  |  |
| **New contract, renewal and/or replacing existing agreement** | |  |
| **Contract cost was included in submitted FY budget: yes or no** | |  |
| **Contract Term (indicate years, months, days or perpetual)** | |  |
| **Contract Effective Date** | |  |
| **Auto Renewal – yes or no/if yes renewal period** | |  |
| **Initial, Start-up, Consulting costs, etc. (excludes annual costs)** | |  |
| **Annual Cost** | |  |
| **Cost over term of contract** | |  |
| **FOAP to be charged (identify funding source)** | |  |
| **Is contact for software, cloud service, or other technology?** | |  |
| **Will data be exchanged, uploaded, or submitted to vendor?** | |  |

|  |  |  |
| --- | --- | --- |
| **PLU Department/Organization** |  | |
| **Dept. POC for Contract Name** | **Email** | **Phone** |
|  |  |  |

Step 2: Once a VP/Provost has approved moving forward, the agreement will be reviewed by the following departments dependent on the type of agreement and university department’s impacted. Shawn Thompson, Director of Risk Services will distribute the agreement to these departments for review.

|  |  |  |  |
| --- | --- | --- | --- |
| **Department** | **Name** | **Initials** | **Date** |
| Risk Services | Shawn Thompson |  |  |
| I&TS | Kevin Berg |  |  |
| Business Office | Erika Borell |  |  |
| BUSO Procurement Manager | Zoe Smith |  |  |
|  |  |  |  |
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Please submit the completed Contract Review and Approval Form to Shawn Thompson, Director of Risk Services, [thompsse@plu.edu](mailto:thompsse@plu.edu). Shawn will submit the form to President’s Council for review and notify you when it has been approved. Once it has been approved you will need to provide the agreement including any referenced policies, order documents, addenda, etc. and the completed Contract Check List.

Contact Shawn Thompson, Director of Risk Services, [thompsse@plu.edu](mailto:thompsse@plu.edu) if you have any questions.