



# PERSONAL SERVICE CONTRACT START UP GUIDE

## TIPS FOR REQUISITION AND THE CONTRACT TEMPLATE

### **The request in CBS should include:**

- Complete budget coding: fund/subfund, program, budg/proj, obj:02/ subobject
- A completed First Draft of the [Personal Service Contract](#)
- Signed W-9 for the Vendor

### **The completed first draft should include:**

- Summary of purpose of contract in description field
- Period of performance in description field:
  - Actual date contractor is to begin work and finish work. OR
  - If contractor already started work (a policy violation) enter actual date contractor began work and is expected to finish work. Provide an explanation as to why contractor was given go-ahead without executed contract in hand.
- The amount contractor will be paid in total, including any allowable expenses for travel, supplies, etc. If over \$9950, provide a [sole source justification memo](#) attached to requisition. If the contractor was named in the funding proposal, documentation from the proposal document may substitute.
- Risk analysis statement in description field. The department needs to think through what the risks are to WSU when the contractor performs his/her work. The risks are minimal for some types of work, and greater for other types. This information will be used for risk assessment and to set the contractor's insurance requirements for the contract.

### **The most important contract template sections to fill with detail are:**

- Chart of Contractor name, address, email and FedID on page 1
- Purpose – in just a sentence or two.
- Scope of work: description of work efforts to achieve the purpose with a list of deliverables with due dates (like reports, presentations, meetings whatever). One option is to reference the contractor's proposal as an Exhibit to the contract, but it must have sufficient detail
- Period of performance: set a start date and finish by date for the contractor
- Compensation amount is a total of professional service fees and reimbursable expenses. Specify any expenses to be reimbursable. Set a dollar limit on reimbursables.
- Contract manager's name and contact information

QUESTIONS? Email [CAHNRS Business Center](#) for assistance.