**CHECKLIST**

**🗹 Consistent formatting throughout the contract:**

* **Font Type and Sizing is uniform**
* **Font Color is black throughout**
* **Section Numbering is accurate (NOTE: Section Numbers DO NOT ONLY appear at the beginning of each clause, but often within the clauses themselves – agencies should run a search for “section” and update each reference accordingly) Leave numbering alone. If you are not using a section – leave number in the document with the heading “RESERVED”**
* **Check footer to make sure page numbers are accurate**

**🗹 Attachment References are accurate and the documents attached (NOTE: attachment references often appear within the clauses as titles only and may not include ‘Attachment X’ reference – agencies should run a search for “attachment and attached” to be sure all referenced documents have been addressed and attached appropriately.)**

* **Optional Clauses that were not used have been removed (leave numbering – and use “RESERVED”)**
* **Any instructional (blue) wording and this checklist have been removed**
* **Signed by Appropriate Executors:**
* **Order of Contract signing:**
1. **Contractor**
2. **MSU Department**
3. **OSP (if OSP funds over $5,000)**

**If Total Contract Value (initial term plus any renewals, installation, travel, training, etc.) is over $25,000, contact Procurement Services**

Contracted Services Agreement

Between

Montana State University

And

Insert Contractor’s Name Here

**A. PARTIES**

THIS CONTRACT is entered into between Montana State University, (insert Department Name), herein referred to as "MSU”, and (insert Contractor’s name), hereinafter referred to as the "Contractor".

**Contractor Information:**

Name:

Address:

Phone #:

Email:

Point of Contact:

*Note: 1) Contractor must provide a signed W9 provided before payment will be processed. If Contractor is a Non-Resident Alien, payment is subject to withholding in accordance with IRS 1042 reporting requirements and Contractor shall request instructions for Non-Resident Alien tax withholding. Non-Resident Alien: YES [ ]  or NO [ ] .*

*2) If Contractor is an individual, he/she must qualify as an Independent Contractor which is verified by Contractor completing and signing an Independent Contractor’s Checklist (PD52).*

**MSU Information:**

Name:

Address:

Phone #:

Point of Contact:

Email:

**Index Number:**

1. **Purpose:** The purpose of this Contract is to (insert purpose).

**(Effective Date should either be upon contract execution to start immediately or on a specified date)**

**2. Effective Date and Duration:** This Contract shall take effect on **(insert date)**, 20**( )**, **(or upon contract execution)** and terminate on **(insert date)**, 20**( )**, unless terminated earlier in accordance with the terms of this Contract. (Section 18-4-313, MCA)

**(Include the following if opting for a renewable Contract. If Total Contract Value for initial year and renewal options exceeds $25,000, Contract Procurement Services.)**

This Contract may, upon agreement between the parties and according to the terms of the existing Contract, be renewed in one-year intervals, or any interval that is advantageous to the University. This Contract, including any renewals, may not exceed a total of **(insert number – maximum of 7)** years.

The Contractor shall commence performance upon receipt of a signed and fully executed contract from MSU. The Contractor shall complete performance to the satisfaction of MSU no later than (insert date).

**3. Services:** The Contractor agrees to perform the following services: (insert detailed description of services to be provided or refer to the Statement of Work – Attachment # 1).

**4. Consideration:** MSU agrees to pay Contractor the sum of $ (insert $ value) for satisfactory completion and acceptance of the contracted service. All payment terms will be computed from the date of delivery of supplies or services OR receipt of a properly executed invoice, whichever is later. Unless otherwise noted, the University is allowed 30 days to pay such invoices. All Contractors may be required to provide banking information at the time of Contract execution to facilitate University electronic funds transfer payments. MSU agrees to pay this amount as follows:

**NOTE: If CSA includes travel reimbursement, Contact Procurement Services to obtain Attachment B Contractor Travel Reimbursement Guidelines to attach to CSA. Whenever possible, any travel costs should be included in vendor’s bid and not a separate expense.**

**5.** **RESERVED**

**6. Relationship of the Parties:** It is mutually agreed that Contractor is an independent contractor and not an employee of MSU for purposes of this Contract. It is understood that the Contractor is not subject to the supervision and control of MSU, nor is the Contractor carrying out the regular business of MSU. Each of the parties will be solely and entirely responsible for its own acts and/or the acts of its employees or agents. No benefits provided by MSU to its employees, including unemployment and workers' compensation insurance, will be provided to the Contractor or his/her/its employees.

**7. Ownership and Publication of Materials:** All material and other information generated under this contract shall be the sole property of MSU.

**8. Access to Records:** The Contractor shall adequately account for and maintain reasonable records for his/her/its performance and allow access to these records by MSU, the Legislative Auditor and/or the Legislative Fiscal Analyst as may be necessary for audit purposes and in determining compliance with the terms of this Contract.

The Contractor shall submit a record of expenditures incurred for the performance and completion of this Contract. MSU may verify all expenditure receipts and disburse funds in an amount equal to the approved expenditures.

All records pertaining to this contract must be retained by the Contractor for a period of five years from the completion date of this Contract. If any litigation, claim or audit is started before the expiration of the five-year period, the records must be retained until the litigation, claim or audit findings have been resolved.

**NOTE: Section 9 needs to be tailored to the project. Contact Procurement Services at 994-3211 or Safety & Risk Management for assistance at 994-2711.**

**9. Required Insurance:**

* 1. **General Requirements.** The Contractor shall maintain for the duration of this Contract, at

its cost and expense, insurance against claims for injuries to persons or damages to property, including contractual liability, which may arise from or about the performance of the work by the Contractor, agents, employees, representatives, assigns, or subcontractors. This insurance shall cover such claims as may be caused by any negligent act or omission.

**9.2 Primary Insurance.** The Contractor's insurance coverage shall be primary insurance as respect to the University, its officers, officials, employees, and volunteers and shall apply separately to each project or location. Any insurance or self-insurance maintained by the University, its officers, officials, employees or volunteers shall be excess of the Contractor’s insurance and shall not contribute with it.

**9.3 Specific Requirements for Commercial General Liability.** The Contractor shall purchase and maintain occurrence coverage with combined single limits for bodily injury, personal injury, and property damage of $1,000,000 per occurrence and $2,000,000 aggregate per year to cover such claims as may be caused by any act, omission, or negligence of the Contractor or its officers, agents, representatives, assigns or subcontractors.

**9.4 Additional Insured Status.** The University, its officers, officials, employees, and volunteers are to be covered and listed as additional insureds; for liability arising out of activities performed by or on behalf of the Contractor, including the insured’s general supervision of the Contractor; products and completed operations; premises owned, leased, occupied, or used.

**9.5 Specific Requirements for Automobile Liability.** The Contractor shall purchase and maintain coverage with split limits of $500,000 per person (personal injury), $1,000,000 per accident occurrence (personal injury), and $100,000 per accident occurrence (property damage), OR combined single limits of $1,000,000 per occurrence to cover such claims as may be caused by any act, omission, or negligence of the Contractor or its officers, agents, representatives, assigns or subcontractors.

**9.6 Additional Insured Status.** The University, its officers, officials, employees, and volunteers are to be covered and listed as additional insureds for automobiles leased, hired, or borrowed by the Contractor.

**9.7 Deductibles and Self-Insured Retentions.** Any deductible or self-insured retention must be declared to and approved by the University. At the request of the agency either: (1) the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects the University, its officers, officials, employees, or volunteers; or (2) at the expense of the Contractor, the Contractor shall procure a bond guaranteeing payment of losses and related investigations, claims administration, and defense expenses.

 **9.8** **Certificate of Insurance/Endorsements:** A certificate of insurance from an insurer with a Best’s rating of no less than A- indicating compliance with the required coverages, has been received by the MSU party listed in Section A above. The Contractor must notify the University immediately, of any material change in insurance coverage, such as changes in limits, coverages, change in status of policy, etc. The University reserves the right to require complete copies of insurance policies always.

**10. Compliance with the Workers’ Compensation Act:** Contractors shall comply with the provisions of the

Montana Workers’ Compensation Act while performing work for the State of Montana in accordance with sections 39-71-401, 39-71-405, and 39-71-417 MCA. Proof of compliance must be in the form of workers’ compensation insurance, an independent Contractor's exemption, or documentation of corporate officer status. Neither the Contractor nor its employees are University employees. This insurance / exemption must be valid for the entire term of this Contract. A renewal document must be sent to the responsible party listed in Section 1 above, upon expiration.

**11. Registration with the Secretary of State:** Any business intending to transact business in Montana must register with the Secretary of State.  Businesses that are incorporated in another state or country, but which are conducting activity in Montana, must determine whether they are transacting business in Montana in accordance with 35-1-1026 and 35-8-1001, MCA.  Such businesses may want to obtain the guidance of their attorney or accountant to determine whether their activity is considered transacting business.

If businesses determine that they are transacting business in Montana, they must register with the Secretary of State and obtain a certificate of authority to demonstrate that they are in good standing in Montana.  To obtain registration materials, call the Office of the Secretary of State at (406) 444-3665, or visit their website at <http://sos.mt.gov>.

**12.** **Indemnification:**  The Contractor agrees to defend, indemnify and hold MSU harmless from all losses and claims that may result to MSU because of the activity of the Contractor, his/her/its agents and/or employees.

**13. Non-discrimination:** The Contractor agrees that under Section 49-3-207, Montana Code Annotated, and the federal civil rights acts, no part of this Contract shall be performed in a manner which illegally discriminates against any person based on race, color, religion, creed, political ideas, sex, age, marital status, physical or mental handicap, or national origin.

**14. Modification:** This contract contains the entire agreement between the parties, and no statements, promises or inducements made by either party, or agents or either party, that are not contained in this Contract are valid or binding. This Contract may not be enlarged, modified, or altered except by written amendment by the parties.

**15. Termination:**

 A. This Contract may be terminated at any time upon the written mutual consent of the parties.

B. MSU may terminate this Contract for failure of the Contractor to perform any of the services, duties or conditions contained in this Contract after providing the Contractor written notice of the stated failure. The written notice must demand performance of the stated failure within a specified period of not less than 30 days. If the demanded performance is not completed within the specified period, the termination is effective at the end of the specified period.

C. The above remedies are in addition to any other remedies provided by law or the terms of this Contract.

**16. Severability:** If one part of this Contract is held to be illegal, void or in conflict with any Montana law, the validity of the remainder of this Contract remains operative and binding.

**17. Assignment, Transfer and Subcontracting:** There will be no assignment or transfer of this Contract, or of any interest in this Contract, unless both parties agree in writing. No services required under this Contract, may be performed under subcontract unless both parties agree in writing.

**18. Notice:** All notices relating to this Contract will be in writing and given to the contact person at the address provided for in this Contract.

**19. Venue:** This Contract will be interpreted according to the laws of the State of Montana. The parties agree that, in the event of litigation concerning this Contract, venue shall be in the Eighteenth Judicial District of the State of Montana, in and for the County of Gallatin.

**20. Debarment:** The contractor certifies, by signing this Contracted Service Agreement, that neither it nor

its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction (contract) by any governmental department or agency. If the contractor cannot certify this statement, attach a written explanation for review by the University.

This Contract consists of **(insert number)** numbered pages, any Attachments as required, and as amended. In the case of dispute or ambiguity about the minimum levels of performance by the Contractor the order of precedence of document interpretation is in the same order. The original will be retained by MSU. A copy of the original shall have the same force and effect as the original for all purposes. To express the parties' intent to be bound by the terms of this Contract, they have executed this document on the dates set forth below.

**NOTE: Please fix any orphan signature lines before circulating for signatures to ensure signature line and title are not on separate pages. OSP signature is only required on Contracts using OSP funds. Legal & Procurement signatures are only required on Contracts exceeding $25,000 – Contact Procurement if your CSA exceeds $25,000.**

**Montana State University** **(Insert Contractors Name)**

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Professor/Principal InvestigatorDate Contractor Name/Title Date

*(if required)*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Department Head *(if required)*  Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dean *(if required)* Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

OSP Administrator/Vice President Date

(***OSP signature required for contracts exceeding $5,000)***

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

MSU Legal Counsel Date

Approved for Legal Format

***(required for contracts exceeding $25,000)***

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Director of Procurement Date
Approved for Form

***(required for contracts exceeding $25,000)***

**Contract invalid unless signed by all required parties**

**Attachment A**

**Statement of Work**