

**Bakersfield City School District
The Advisory Bulletin**

To: Principals and Department Heads	Date: August 19, 2004	No.
Subject: Consultant Agreements & Payments – How to Prepare Forms		
Prepared By: Michael D. Lingo, Assistant Superintendent-Business Services		
Approved By: Dr. Jean Fuller, Superintendent		Page 1 of 6

All **Consultant Service Agreements** and **Requests for Payment** for consultant services are to be processed through the office of the Assistant Superintendent-Business Services. Please send the ENTIRE consultant agreement form for processing – do not remove any pages.

Consultant Service Agreements Prepared by Departments:

1. Prepare the consultant service agreement form (Store Stock #300165). Make sure ALL information is provided.
2. Obtain the signature of the consultant.
3. Obtain the signature of the department head.
4. The Administrator/Asst. Superintendent over that Department **initials next to the department head's signature**. NOTE: initialing means - the initial of the first name along with the complete last name AND the supervisor DOES NOT sign his/her name on the line that reads "superintendent (or) designee."
5. The agreement is sent to Mike Lingo's office for processing.
6. Once the agreement has been Board approved, the department will receive a fully executed copy.

Consultant Service Agreements Prepared by Schools:

1. Prepare the consultant service agreement form (Store Stock #300165). Make sure ALL information is provided.
2. Obtain the signature of the Consultant.
3. Obtain the signature of the Principal.
4. Send the entire agreement to the Assistant Superintendent-Instructional Services for signing **OR** to Deenie Massey (if to be paid for out of specially funded funds) for processing as follows:
 - a. The Asst.Supt.-Instructional Sers. will **initial next to the principal's signature**. NOTE: initialing means: the initial of the first name along with the complete last name.
 - b. Deenie Massey will verify specially funded budget information and initial the agreement.
 - c. The agreement is sent to Mike Lingo's office for processing.
 - d. Once the agreement has been Board approved, the school **OR** Deenie Massey (if specially funded) will receive a fully executed copy.

W-9 Form (Taxpayer Identification Number and Certification):

A "Taxpayer Identification Number and Certification" form (W-9) must be completed once a year by the consultant. The forms can be obtained from Mike Lingo's office (ext. 14678). The form MUST be completed and signed by the consultant and attached to the consultant agreement form.

Continued on next page. . . .

Requests for Payment Prepared by Departments:

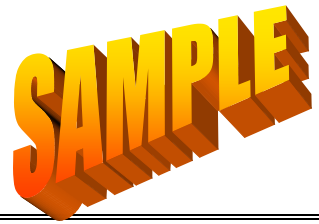
1. Prepare a requisition on the computer system. The following information is to be provided:
 - a. consultant's name and complete address
 - b. brief description of service(s) provided
 - c. date(s) service(s) provided
 - d. location(s) service(s) provided
 - e. itemization of expenses (per day fee, hotel, meals, etc.), IF consultant is not paid a lump sum
 - f. Board approval date (this information can be found on the copy of the consultant agreement returned to the department following the Board meeting)
 - g. correct budget classification
 - h. a signature line for the consultant
 - i. a signature line for the department head
2. Print out a copy of the requisition.
3. Send the requisition to Purchasing via the computer system.
4. Obtain the signatures of the consultant and the department head. NOTE: An "original" consultant signature is required – no faxed signatures.
5. The Administrator/Asst. Superintendent over that Department initials or signs **next to the department head's signature.**
6. Completed requisition is sent to Mike Lingo's office for processing – be sure to attach any invoices or bills to the requisition.
7. Once all information has been verified, the requisition is forwarded to Purchasing for payment.

Requests for Payment Prepared by Schools:

1. Prepare a requisition on the computer system. The following information is to be provided:
 - a. consultant's name and complete address
 - b. brief description of service(s) provided
 - c. date(s) service(s) provided
 - d. location(s) service(s) provided
 - e. itemization of expenses (per day fee, hotel, meals, etc.), IF consultant is not paid a lump sum
 - f. Board approval date (this information can be found on the copy of the consultant agreement returned to the school following the Board meeting)
 - g. correct budget classification
 - h. a signature line for the consultant
 - i. a signature line for the principal
2. Print out a copy of the requisition.
3. Send the requisition to Purchasing via the computer system.
4. Obtain the signatures of the consultant and the principal. NOTE: An "original" consultant signature is required – no faxed signatures.
5. Send the requisition to the Asst. Superintendent-Instructional Services **OR** to Deenie Massey (if to be paid for out of specially funded funds) for processing as follows:
 - a. The Asst. Supt.-Instructional Sers. will **initial next to the principal's signature.** NOTE: initialing means: the initial of the first name along with the complete last name
 - b. Deenie Massey will verify specially funded budget information and initial the requisition
 - c. The requisition is sent to Mike Lingo's office for processing – be sure to attach any invoices or bills to the requisition
 - d. Once all information has been verified, the requisition is forwarded to Purchasing for payment

Samples of completed forms on following pages. . . .

BAKERSFIELD CITY SCHOOL DISTRICT
Education Center, 1300 Baker Street
Bakersfield, California 93305
Office of Assistant Superintendent - Business Services
AGREEMENT FOR CONSULTANT SERVICES



Enter the Date When Agreement is Typed:

This Agreement is made and entered into this 1st day of September, 2004, by and between the governing board of the BAKERSFIELD CITY SCHOOL DISTRICT of Kern County, California, hereinafter referred to as "District" and **(Type Consultant's Name Here):** Jon Dough, whose principal place of business is in **(Type City/State Where Consultant Lives Here):** Bakersfield, California, hereinafter referred to as "Consultant."

IT IS AGREED THAT:

1. Consultant will provide the services as set forth in the Agreement (or in attached proposal) in coordination with the District Superintendent or his designee as follows: *(Include brief description of presentation)*

School/Department submitting request: ABC School Place: Ed. Center PDC
Description/Purpose: (Type a Brief Description of Services Consultant is Providing): Time: 9 a.m. to Noon
The author will demonstrate writing techniques for teachers.

Enter beginning & ending date of Consultant's Services:

1. This Agreement shall be for a specified period, commencing on Sept. 15, 2004 and ending on Sept. 15, 2004.

Enter dollar amount Consultant is to be paid:

The compensation for consultant services under this Agreement shall be at the rate of \$ 300 per day.

2. District shall reimburse Consultant for mileage, food, lodging, and *actual and necessary* expenses (i.e., airfare and materials). Mileage shall be at the rate of \$0 per mile; food and lodging allowance not to exceed \$ 0 per day.

Enter TOTAL dollar amount to be Paid to Consultant:

3. Total compensation under this Agreement (including mileage, food, lodging) shall not exceed \$ 300 (plus airfare and materials). **Receipts to verify expenses for food, lodging, airfare, and materials will be required.**
4. Payments for services and reimbursement for expenses under this Agreement shall be made within thirty days after the completion of all services to be performed and receipts have been received.
5. Consultant shall not assign or transfer in any way his or her interest or obligations under this Agreement without the written consent of the Superintendent or his designee.
6. This Agreement may be amended or modified at any time by mutual agreement of the parties, in writing.
7. It is understood and agreed that the Consultant is at all times an independent contractor and neither he nor his employees are employees of the District.
8. The District has determined that neither its employees, the county superintendent's employees, nor the employees of the adjoining districts or county superintendents, are able to provide the service provided for in this Agreement. A find to that effect has been entered by the Board of Education in the minutes of its meeting of _____, 20 _____. **(LEAVE BLANK)**
9. Consultant agrees to notify his school employer (if he is employed by a school district, county superintendent or other school entity) of this Agreement and the dates upon which he intends to perform pursuant to this Agreement. Consultant agrees that he will not accept any salary, other than leave, compensatory time off or vacation benefits, from his school employer while he is performing services pursuant to this Agreement.

IN WITNESS THEREOF, the parties hereto have executed this Agreement the day and year first above written.

BAKERSFIELD CITY SCHOOL DISTRICT
BOARD OF EDUCATION ("District")

CONSULTANT

By (LEAVE THIS BLANK)
Superintendent (or) Designee

(CONSULTANT MUST SIGN HERE)
Consultant Signature

(PRINCIPAL or DEPARTMENT HEAD SIGNS)
Principal AND Department Head Signature

(CONSULTANT MUST COMPLETE THIS)
Social Security Number (or) Employer I.D. Number

(TYPE OTHER BUDGET CLASSIFICATION:)

(TYPE SPECIALLY FUNDED BUDGET HERE:)

Please submit 5 copies two weeks prior to Board Meeting.

SPECIALLY FUNDED PROJECTS	
Program Title	_____
Budget Class	_____
Component	_____

OTHER BUDGETS (list number)
General Fund _____
Magnet Fund _____
Lottery Fund _____
Other _____
(list NAME and number)

Bakersfield City School District
 1300 Baker Street
 Bakersfield, CA 93305
 (661) 631-4600



Req. No: 05103222 PO Number: Date Needed Date PO Printed Date Req. Printed
 09/16/04

Vendor: 000000

JON DOUGH
1234 SUNSHINE AVENUE
BAKERSFIELD, CA 92222

Ship To:
 WAREHOUSE SERVICES
 1300 BAKER STREET
 BAKERSFIELD, CA 93305

Requested By:
Typist's Name Will Appear Here

Location:
Site Where Req. Is Being Prepared

Lin	Qty	Unit Description	Item Cost	Total Cost
1				
2		(TYPE A BRIEF DESCRIPTION OF SERVICES	300.00	300.00
3		PROVIDED BY CONSULTANT & DATE(S) OF		
4		SERVICE(S) & LOCATION OF SERVICE(S)		
5				
6				
7				
8		_____ (Prepare a line for Consultant's Signature)		
9		Consultant's Signature		
10				
11				
12		(Enter Board Approval Date Here) – this can be found on the copy of the Consultant		
13		Agreement returned to you.		
14				
15				
16				
17		_____ (Prepare a line for Principal or Department		
18		Principal or Department Head Head's Signature)		
19				
20				
21				
22		_____ (Prepare a line for Mr. Lingo's signature)		
23		Asst. Superintendent-Business Services		
24				

(The Budget Classification you enter will appear here)

SUB-TOTAL 300.00
 TOTAL 300.00