

Business and Operations

PREPARATION OF CONSULTANT SERVICES AGREEMENT SR 3430.01

Purpose:To contract for consultant services when an employee is unable or not available to provide specialized services.

Timeline:Contracts typically require between five (5) and ten (10) working days to process.

Contracts must be completed prior to services being rendered.

Sometimes the County Office may wish to use the services of an independent consultant. Typically, an independent consultant is hired when the time, commitment and/or skills required preclude a regular employee from meeting the responsibilities identified. Prior to initiating a contract, Department directors shall obtain verbal approval from her/his immediate supervisor for securing the services of a consultant, for the selection process to be used and for the amount of compensation.

In determining if an independent contractor relationship exists, the County must be certain that the individual meets the necessary criteria and then would be paid on a commercial check. If an employer/employee relationship exists, then the individual should be paid on the payroll for federal withholding tax purposes. See the Common Law Rules to determine the relationship between the County and the individual.

PROCEDURE:

1. [Common Law Rules](#) must be reviewed to determine contractor relationship.
2. If the individual is determined to be an independent contract, complete the [Certification of Independent Contractor Status](#) form and forward it to Accounts Payable.

For Contracts exceeding \$200

1. Consultant completes a [W9 form](#) and forwards to department director.
2. Department director completes [Consultant Services Agreement](#) and purchase order requisition and obtains consultants signature and SSN or tax payer ID on document. All documentation is forwarded to Business Services.
3. Administrator signs both the Agreement and purchase order requisition and forwards to the Superintendent.
4. Superintendent approves and signs Consultant Services Agreement and forwards both documents to Business Services.
5. Business Services reviews purchase order for completeness, proper budget code(s) and availability of funds, (unresolved problems may cause the proposed arrangements to be disapproved.)
6. Business Services prints purchase order and returns a copy to department.
7. **Consultant does not begin work before the Agreement and purchase order have been approved and processed.**
8. Consultants or contracted employees who work on a school site may be required to be fingerprinted prior to beginning work (*see [Consultant Services](#)*)

[Agreement](#))

For Contracts of \$200 or Less

1. Consultant completes a W9 form and forwards to department director.
2. Department director completes [Letter of Agreement](#) and purchase order requisition and obtains consultants signature and SSN or tax payer ID on document. All documentation is forwarded to Business Services.
3. Administrator approves both the Letter of Agreement and the purchase order requisition, forwarding both documents to Business Services.
4. Business Services reviews the purchase order for completeness, proper account code(s) and availability of funds. Purchase order is printed and a copy returned to department.
5. Consultant does not begin work before Letter of Agreement and purchase order have been approved and processed.

MENDOCINO COUNTY OFFICE OF EDUCATION

Date Adopted: 03/01/2003

Date Revised: