

Instructions for Using the Contracted Services Agreement for Professional Services

WMIS xxxxx form is to be completed and approved for any professional services obtained by the school district. The Agreement must be completed in its entirety. *If a formal agreement has been used in the past with a contractor, that agreement may be attached to this form and any provisional requirements under this Agreement form can be referred to and satisfied by the provisions in the attached agreement. However, nothing in the attached agreement can contradict what is stipulated on the Agreement form.* Also, for budgeting and payment purposes, a purchase order must accompany the Agreement.

Consultant Information

If an individual contractor is being sought, please provide his/her name in the appropriate space. If such an individual contractor also operates under a company name (i.e. “doing business as [dba]”), please provide that information, as well. In such cases, the W-9 (see below) should also indicate the name of both the individual and their dba company. Such information will be necessary for the accurate completion of the 1099 Form related to contractor payments during the calendar year.

W-9 Information

A W-9 IRS form must be obtained from the prospective contractor. However, if the contractor is incorporated, then a W-9 would not be required. Blank W-9 forms can be obtained from the Finance Office or the website for IRS. If you believe that the contractor has previously conducted business in our District, you may verify with the Finance Office (Linda Marks or Dora Dugger) that a W-9 is currently on file. Without a W-9 on file, initial payments to the contractor may be delayed until such form is received by the Finance Office. Regardless, check one of the three boxes on page 1 to indicate the status of the contractor’s W-9.

Description of Professional Services

Please provide a detailed description of services agreed to with the contractor. Attachments are allowable.

Term of Agreement

All contracts must specify a beginning and ending date within the same fiscal year. Contract terms extending over several fiscal periods will require District approval. Renewal provisions for future fiscal periods may be agreed to in the Other Provision section of this form, subject to District approval.

Method of Payment

A contract amount should be based upon an hourly, daily, or monthly rate. Alternatively, a contract amount can be based on a particular product produced or service rendered (e.g. completion of an evaluation). Payment to the contractor shall be based and verified on the method selected. If only a single product is to be obtained by the District and receipt of the product completes the contract, then any interim payments to the contractor should be accompanied by some form of a progress report to support such payment to the contractor.

Reimbursable expenses must be specified in the Agreement and included in the total amount of the contract awarded. Travel expenses of the consultant reimbursed by the District will be excluded from the total payment information reported to the IRS.

Contract Provisions

The provisions required within this contract form are required under Federal and State laws. Additional provisions that are not contradictory to existing provisions may be agreed to by both parties in the Other Provisions part of the Agreement. Both parties must initial the Agreement in the spaces provided.

Signatures

Your signature and the consultant's signature must be obtained before the Agreement can be submitted to the Superintendent for his approval. Additional copies of the Agreement may be submitted if required.

Please direct any questions regarding the Agreement or these instructions to Randy Beach in the Finance Office (926-0104).