

**SAN MARINO UNIFIED SCHOOL DISTRICT
INDEPENDENT CONTRACTOR AGREEMENT PROCEDURES
October 14, 2015**

Before an Independent Contractor can provide services to the District/Schools ALL steps must be completed and approval from the Board of Education must be received.

Prepare the Agreement

Refer to the District's standard template for contracts and agreements. Please see the following link: [SMUSD Contract Template](#).

Complete all sections, including the following:

1. **Effective Date:** Fill in the effective date, which should be after the Board approval date
2. **Contractor Name:** List the Independent Contractors "dba" business name
3. **Term of Agreement:** With few exceptions, all contracts and agreements shall be effective through the end of the fiscal year (e.g. June 30, 2016).
4. **Independent Contractor Contact:** Include business name, the contact person, business mailing address, business phone #, email, and Tax Identification number.
5. **District Contact:** For instructional contracts, list Dr. Gary McGuigan; personnel and employee training contracts, list Linda de la Torre; for technology contracts list Stephen Choi, Chief Technology Officer; and, for business contracts, list Julie Boucher. Please add their contact phone number, fax number, and email address. Note: any contract in excess of \$100,000 will need to be approved by the Superintendent, Dr. Alex Cherniss.
6. **Services to be Rendered:** describe in detail the services to be rendered by the Independent Contractor. Note: with few exceptions, all independent contractors are required to enter into an Agreement with the District prior to beginning services.
7. **Terms of Payment:** list the terms of payment. Note: the District cannot agree to nor authorize prepayment for services rendered. As note, upon completion of services, the Independent Contractor shall submit an invoice to the District. Payment will be made within 30 days of receipt of the invoice.
8. **Contract Number:** The Accounting Office will assign a Contract Number.
9. **Signature Page:** Once Board approval is received, the originating office shall proceed with receiving two original signed copies of the Agreement by the Contractor and the District representative. One executed copy shall be provided to the Contractor and the other original sent to the Accounting Office.

Request Insurance Certificate(s):

Independent Contractors who perform services at a school site or for the District shall provide the District with certificates of insurance for Workers Compensation and Liability Insurance. A Liability Certificate of Insurance must list the San Marino Unified School District as additional insured or a separate endorsement page shall be attached to the certificate from the Independent Contractor. Depending on the type of services provided, Workers Compensation may not be required. For technology-related contracts, all independent contractors must agree

to AB 1584 requirements. In these cases, a supplemental AB 1584 terms and conditions must be completed, executed and attached to the Agreement. For Contractors performing maintenance projects, procedures in accordance with SB854 must be followed.

Contractor to Submit IRS Form W-9

An IRS Form W-9 is required for all independent contractors. The form can be found at: [Form W-9](#). It is the Independent Contractor's responsibility to complete the Form W-9 and submit it with the Agreement and insurance certificates.

Prepare a District Requisition Form

Prepare a District Requisition Form and on the Requisition, listing the Contractor's Company, Terms of the Agreement, and an Abbreviated Description of Services. Attach an executed copy of the Agreement, the Form W-9, and the Certificates of Insurance to the Requisition for processing. Submit the Requisition to the Purchasing Office for processing. Note: Incomplete Agreement packages may cause delays in both processing the agreements and the ability for the Independent Contractor to begin services.

Purchase Order

Upon issuance of a Purchase Order, the Originator will send a copy of the executed contract and a copy of the Purchase Order to the Independent Contractor.

Invoicing

Upon completion of services, a copy of the Independent Contractor's invoice signed by the designated administrator should be sent to the Accounting Department for payment processing.

Questions

Please contact the Business Office at ext. 1390.