



SANTA MARIA-BONITA SCHOOL DISTRICT
 708 South Miller Street
 Santa Maria, CA 93454
 (805) 928-1783

CONSULTANT AGREEMENT (Part I)

I am a Santa Maria-Bonita School District employee
 (STOP! Do not complete this form. You must use an Extra Work Agreement)

I am an independent contractor-attach the following

- Independent Contractor Questionnaire
- Form W-9 completed and signed
- Vendor contract, if appropriate

SMBSD staff complete and attach
 Independent Contractor Evaluation Form

NAME _____ SOCIAL SECURITY # _____
 /EMPLOYER I.D. # _____

ADDRESS _____ CITY _____

STATE/ZIP _____ PHONE NUMBER _____

DATE(S) OF SERVICES _____ LOCATION _____

BUDGET CODE ____-____-____-____-5860-____-____-____ Budget Approval _____

DESCRIPTION OF ACTIVITIES _____

ESTIMATED FEE - Note: Vendor/consultant invoices are required for all payments

____ Days x Daily Rate \$ _____ = \$ _____

____ Hours x Hourly Rate \$ _____ = \$ _____

Flat Fee / Honorarium = \$ _____

Is an advanced deposit required? No Yes
 (circle one)

Other Authorized Expenses:

Note: The District does not reimburse for travel or meals. These costs should be included in consultant's fee.

_____ = \$ _____

TOTAL ESTIMATED FEE = \$ _____

Amount required = \$ _____
 Please attach invoice

 Consultant's Signature Date

 Administrator's Signature Date

Return this form with the required documentation to the Business Services Department for review & requisition processing.

***** Business Office Use *****

Approval of Independent Contractor status _____ Date _____

Requisition # _____ Entered by _____ PO# _____



Service Provider Evaluation Worksheet

General Instructions: This worksheet is intended to evaluate the relationship between Santa Maria-Bonita School District and the service provider. Check the either the "Yes" or "No" column to help you determine their independent contract status.

Name of Service Provider being evaluated: _____ Date: _____

Name of person completing this worksheet: _____ School/Dept.: _____

Financial Control: (check all that apply)	Yes	Generally indicates Employee Classification	No	Generally indicates Independent Contractor Classification
Will the District provide any of the following: office space, equipment, materials, tools and/or supplies?	<input type="checkbox"/>	SMBSD furnishes equipment, materials, tools, and/or supplies	<input type="checkbox"/>	Individual furnishes everything. <i>Independent contractors generally supply the materials for the job and use their own tools and equipment.</i>
Will the District pay the worker's business and/or travel expenses?	<input type="checkbox"/>	SMBSD pays the business and travel expenses.	<input type="checkbox"/>	Responsible for all expenses. <i>Independent contracts can maximize profit by managing costs.</i>
Will the contract be based on hourly, weekly, or monthly rate?	<input type="checkbox"/>	SMBSD pays on an hourly, weekly, or monthly basis.	<input type="checkbox"/>	SMBSD pays per project <i>Independent contractors are paid by job or project, though by industry practice, some are paid by the hour.</i>
Behavioral Control: (check all that apply)				
Do you have the right to give the worker instructions about when, where and how to	<input type="checkbox"/>	Complies with instructions. <i>Indicates control over the worker.</i>	<input type="checkbox"/>	Determines own schedule, location, and tasks.
Will the District provide training to the individual?	<input type="checkbox"/>	SMBSD provides training	<input type="checkbox"/>	Responsible for own training. <i>Independent contractors are already trained.</i>
Will you require the individual to perform the services personally?	<input type="checkbox"/>	Must be performed personally. <i>Indicates that you are interested in the methods employed and not just the results.</i>	<input type="checkbox"/>	Can be performed by his or her employees or subcontractors.
Will the District establish the hours of work	<input type="checkbox"/>	SMBSD sets the hours.	<input type="checkbox"/>	Responsible for his or her own schedule.
Will the District require the services full time during the duration of the contract	<input type="checkbox"/>	SMBSD requires full-time commitment.	<input type="checkbox"/>	Can work for others during the period of the contract. Independent contractors choose where and when they will work.
Will the work be performed on the District's premises?	<input type="checkbox"/>	Performed on SMBSD's facilities.	<input type="checkbox"/>	Performed at the individual's place of business.
Will the District require progress reports on a regular basis?	<input type="checkbox"/>	SMBSD requires reports.	<input type="checkbox"/>	Reports are not required unless stipulated in contract.
Relationship: (check all that apply)				
Does the service provider work for one firm at a time?	<input type="checkbox"/>	Works for only one firm at a time.	<input type="checkbox"/>	Performs services for multiple unrelated customers at the same time. <i>Tends to indicate independent contractor, but isn't conclusive since employees can work for more than one employer.</i>
Does the service provider make his or her services known to the public primarily through word of mouth?	<input type="checkbox"/>	Makes services known by word of mouth.	<input type="checkbox"/>	Advertises his or her business in publications, yellow pages, web, etc.
Does the District have the right to discharge the worker?	<input type="checkbox"/>	SMBSD has the right to discharge.	<input type="checkbox"/>	Cannot be fired if he or she produces a result based on the specifications of the contract. An independent contractor can't be fired without subjecting SMBSD to risk of breach of contract.
Does the individual have the right to end his or her relationship with the District at any time without incurring liability?	<input type="checkbox"/>	The individual can terminate at any time	<input type="checkbox"/>	The service provider incurs liability for non-delivery.
Does the District anticipate a continuing relationship?	<input type="checkbox"/>	SMBSD anticipates a continuing relationship	<input type="checkbox"/>	A continuing relationship is not anticipated. Projects are contracted only when need arises.
Will you integrate the worker's services into your daily operations by providing email, an office, and requiring attendance at meetings?	<input type="checkbox"/>	Integrated into SMBSD	<input type="checkbox"/>	Independent of the District's activities.