

Consultant Agreements

Definition & Requirements

Any time an outside vendor comes on campus/any District property to conduct an assembly or services, they are classified as a **Consultant**.

- The school site is responsible for coordinating directly with the vendor to lock in dates, times, and program specifics.
- **Advance Planning Rule:** All consultant agreement paperwork must be completed and submitted **6 to 8 weeks in advance** of the assembly date to ensure adequate processing time.
- The vendor must complete the appropriate Consultant Agreement form (the specific form depends on whether the total service cost is over or under \$5,000.00).
- **Board Approval:** Any consultant agreement totaling **over \$5,000.00 requires Board Approval** before services can be rendered.

Mandatory Documentation Checklist

To process an agreement, you must collect the elements noted in the contract, attaching the following documents prior to requisitioning:

1. **Scope of Work:** Assembly quote or formal reservation confirmation.
2. **Insurance:** Certificate of Liability Insurance.
3. **Tax Documentation:** A current W-9 form.
4. **Megan's Law Background Check:** Fully completed and signed by both the consultant and the school secretary.
5. **TB Test Clearance:** Strictly required if the consultant will be working directly with students five (5) or more times.
6. **Authorized Signatures:** Must include both the Consultant signature and the Site Supervisor signature.

Payment Policy

Standard payment is issued *after* the successful completion of services.

- **Upfront Assembly Payments:** If a vendor requires payment prior to the assembly, this must be explicitly noted on the agreement form under **Section #3: Payment Schedule**.
- Ensure all items in the mandatory checklist above are attached and sign the reservation confirmation with "**Okay to Pay**" to process the check.
- **Reminder:** Just like field trips, advanced checks require a **6–8 week** processing window.