PERSONAL (LIMITED) SERVICES CONTRACT CHECKLIST

1. Define the need (start at least 2 months in advance of when the work is to start)
2. Identify funding and determine availability
3. Secure departmental approval to proceed with the process
4. Prepare the Scope of Work
5. Determine if need is to hire a contractor/consultant or employee
6. If the need requires a consultant, solicit the consultant via competitive proposals or request exemption due to sole source, as applicable
7. Evaluate proposals and select the consultant
8. Verify FOAPA and confirm funding availability
9. Determine if special Board approval is required
10. Determine if the contract will be Personal (Limited) Services or Professional Services
11. If compensation to the consultant will exceed $10,000 in one fiscal year, follow the established procedures for obtaining Board approval and the checklist for Professional Service Contracts.
12. Prepare the contract documents with one original and three copies
13. Send the contract to the consultant at least one month in advance of when the services are required to commence. However, it is critical to include a written notice that contract award is subject to Administrative approval.
15. Submit the complete contract document package to the Office of Administrative Services at least two weeks prior to the date work is to commence.
16. Make sure that the contract document package is complete prior to submitting to Administrative Services for processing and administrative approval. (Incomplete contract packages may be returned and otherwise be delayed in processing.)
   a. Contract form with all blank spaces filled in and the FOAPA is correct
   b. Make sure that all required and proper contractor and department signatures are provided
   c. Independent Contractor Certification is completed for payments over $600
d. Include a copy of the individuals’ resume or Summary of Qualifications

e. Attach the required requisition needed to have the contract set up in BANNER

f. Include an explanation for anything unusual about the contract that could delay processing due to our office not having enough information to sufficiently understand the contract.

17. If the contract is grant funded, make sure that the contract submittal package includes the following additional documents:

   a. Copy of Board Resolution authorizing application for funding (A copy of the Agenda Report should be reviewed by the Grants Accountant before submittal to the Board.)

   b. Copy of the Grant Agreement (Signature page)

   c. Copy of the Grant Budget Worksheet (as required to establish the FOAPA).

18. Once the contract has been fully executed and a purchase order has been issued, the consultant can be given a Notice to Proceed. **The consultant can commence performing the work!**

19. **Single payment contracts do not require an invoice.** Consultants only have to submit an invoice if multiple payments are involved. The invoice must outline the services rendered and fees consistent with the terms of the contract.

   a. The invoice must be on the firm’s letterhead.

   b. The invoice must be submitted to the program/project coordinator for approval.

   c. The departmental personnel or project coordinator must verify performance consistent with the terms of the contract as a part of its approval.

   d. Fill in the information on the contract required for multiple payment processing.

   e. Submit the a copy of the Contract with the completed Multiple Payment Processing information to the Accounts Payable Accountant/Clerk assigned to your department.

   f. Allow at least ten days for payment.

   g. Follow up with the Accounting department for all questions concerning payments.

**NOW YOU HAVE DONE THE JOB RIGHT!**