PROFESSIONAL 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/Performance Specifications
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 is one fiscal year, follow the established procedures for obtaining Board approval.
12. Prepare the contract documents with one original and three copies
13. To expedite processing when special Board approval is required, the contract documents may be forwarded to the consultant to sign. However, it is critical to include a written notice that contract award is subject to Board and Administrative approval. You may also want to send a copy of the Board Agenda report to the Office of Administrative Services in advance of the Board meeting for contracts on a tight processing schedule.
14. If no special Board approval is required, 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. W-9 is submitted with all contracts if not previously submitted by contractor
e. Include an Attachment A – Scope of Services. (Determine if additional terms and conditions are required to protect the District’s interests.)
f. Confirm the insurance requirements and attach the Certificate of Insurance as required
g. Include a copy of the individuals’ resume or Summary of Qualifications
h. If the contract is over $10,000 or the consultant will otherwise be compensated $10,000 or more in a fiscal year, attach the Board resolution authorizing contract award
i. Attach the required requisition needed to have the contract set up in BANNER
j. 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 Board Resolution authorizing contract for services over $10,000 (Contract term may not exceed the approval grant term and grant performance period.)
c. Copy of the Grant Agreement (Signature page)
d. 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. Consultants must submit an invoice in order to get paid.
   a. The invoice must outline the services rendered and fees consistent with the terms of the contract.
   b. The invoice must be on the firm’s letterhead.
   c. The invoice must be submitted to the program/project coordinator for approval.
   d. The invoice must be approved by other departmental personnel, as applicable.
   e. The departmental personnel or project coordinator must verify performance consistent with the terms of the contract as a part of its approval.
   f. The invoice must be coded with the correct budget/FOAPA consistent with the purchase order/Term Purchase Agreement.
   g. Submit the invoice to the Accounts Payable Accountant/Clerk assigned to your department.
   h. Allow at least ten days for payment.
   i. Follow up with the Accounting department for all questions concerning payments.

NOW YOU HAVE DONE THE JOB RIGHT!

*Thank you for your cooperation!*