



ORCUTT UNION SCHOOL DISTRICT
500 Dyer
Orcutt, CA 93455
(805) 938-8900

CONSULTANT AGREEMENT (Part I)

I am an Orcutt Union School District employee
(STOP! Do not complete this form.)

I am an independent contractor-attach the following

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

OUSD 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 Orcutt Union 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?	☐	OUSD furnishes equipment, materials, tools, and/or supplies	☐	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?	☐	OUSD pays the business and travel expenses.	☐	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?	☐	OUSD pays on an hourly, weekly, or monthly basis.	☐	Orcutt 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	☐	Complies with instructions. <i>Indicates control over the worker.</i>	☐	Determines own schedule, location, and tasks.
Will the District provide training to the individual?	☐	OUSD provides training	☐	Responsible for own training. <i>Independent contractors are already trained.</i>
Will you require the individual to perform the services personally?	☐	Must be performed personally. <i>Indicates that you are interested in the methods employed and not just the results.</i>	☐	Can be performed by his or her employees or subcontractors.
Will the District establish the hours of work	☐	OUSD sets the hours.	☐	Responsible for his or her own schedule.
Will the District require the services full time during the duration of the contract	☐	OUSD requires full-time commitment.	☐	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?	☐	Performed on OUSD's facilities.	☐	Performed at the individual's place of business.
Will the District require progress reports on a regular basis?	☐	OUSD requires reports.	☐	Reports are not required unless stipulated in contract.
Relationship: (check all that apply)				
Does the service provider work for one firm at a time?	☐	Works for only one firm at a time.	☐	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?	☐	Makes services known by word of mouth.	☐	Advertises his or her business in publications, yellow pages, web, etc.
Does the District have the right to discharge the worker?	☐	OUSD has the right to discharge.	☐	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 Orcutt 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?	☐	The individual can terminate at any time	☐	The service provider incurs liability for non-delivery.
Does the District anticipate a continuing relationship?	☐	OUSD anticipates a continuing relationship	☐	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?	☐	Integrated into OUSD	☐	Independent of the District's activities.