

Special Request Items

A Guide to Faster, Correct Ordering

VI. ICA's (Independent Contractor Agreements)

IMPORTANT! Complete ICA Form Eight (8) Weeks *Prior* to BOE Meeting

PRIOR TO SERVICES BEGINNING:

School Site or Department Completes:

Independent Consultant Agreement (ICA) Form

- **(NOTE: This process is to be used for service agreements up to \$10,000).**
- Complete all required information on the ICA form including: **valid** (*successfully budget-checked*) ePro Requisition number (*Contact Budget Analyst right away if budget error occurs.*)
- Ensure consultant/vendor signs ICA Form, with Fed. ID # or SS#. Contractor is to attach IRS Form W9. If vendor is outside California, Contractor needs to add CA Form 590.
- Provide Form with completed description of services being rendered. Contractor must attach the "Scope of Work" of services to be performed for our District. This may include the "Contract" from the Contractor.
- Provide start and end date of service(s).
- Provide Unite Price or Rate of Pay/compensation with the total dollar amount.
- Provide Budget (Chartfield) String bad budget description.

Follow the Internal Approval Process:

1. Have your Principal or Dept. Head sign the ICA Form.
2. Submit to Area Superintendent, Director, or Cabinet Level Approver for signature.
(Vendor, Site Administrator, and Cabinet Level Rep signatures are all required!!!).
3. Next, be sure to scan the completed signed ICA form and email it as a PDF attachment to Julio Gomez: **jgomez1@sandi.net**
4. Also mail the completed signed ICA form, with original signatures, via Interoffice School Mail with all approved documents attached, to:

Strategic Sourcing and Contracts ATTN: Julio Gomez

***** FAILURE TO PERFORM ALL ABOVE STEPS WILL CAUSE DELAYS *****

The Strategic Sourcing & Contracts Dept. will then take the following actions:

5. Review, approve and/or disapprove all documents submitted.
6. Verify the ePro Requisition is Valid (*successfully budget-checked*).
7. Place on Board of Education (BOE) Agenda with recommendation for approval.
8. Create PO (Purchase Order) number following BOE approval, and forward ICA Form to Accounts Payable Dept.