

## **Consulting Agreement (Short Form) Instructions for Use**

### **Step One**

- a. Confirm that the Consultant, including anyone providing consulting services under the Agreement, is not a current STC employee or a former STC employee who left STC within 12 months of the Engagement Date.
- b. In the body of the Agreement, please include:
  - The Consultant's name and the contact information for STC and the Consultant. (If the Consultant is a business entity--corp., LLC, partnership, etc.--the name of the business entity should be listed. For example, A-1 Consulting, LLC, attn. John Smith, President. *The Agreement must be between STC and the person or business entity to whom STC is making the payment as shown on the Consultant's W-9 federal tax form.*)
  - A description of the Services in Section 1.
  - The term of the Agreement in Section 2.
  - In Section 4.a., a description of the fees that will be paid; if expenses will be reimbursed, check the box and initial the bracketed box.
  - In Section 4.b., list the not-to-exceed amount, which should include reimbursable expenses if applicable.
  - In the signature box, insert the name of the Consultant and, if the Consultant is a business entity, the name and title of the person signing on behalf of the Consultant.
  - If the amount of the Agreement is less than \$1,000.00, provide the name and title of the Financial Manager who will sign the Agreement on behalf of STC.
- c. Send a draft of the Agreement for the Consultant's review and approval; make any necessary changes and then finalize.

***If you have any questions about or would like help with the completion of the forms, please do not hesitate to contact Todd C. Nelson (tnelson2@southtexascollege.edu).***

### **Step Two**

- a. Make arrangements for the Consultant to:
  - sign and date the Agreement (and initial 4.a., if applicable)
  - read and initial sections 26 and 27
  - fill out and sign a W-9 form
  - provide any additional required information such as references or a CV

(If the Consultant has provided the W-9, references or CV within the fiscal year to which this Agreement applies, these documents do not need to be provided again.)

At your option, you may:

- i) mail or deliver a paper copy of the Agreement and other forms to the Consultant to be signed, initialed and dated; or
- ii) send the documents as an email attachment for the Consultant to print and sign/initial/date; or
- iii) have the Consultant sign/initial/date the documents in your office.

***The Consultant should return the original Agreement (signed, initialed and dated) by mail or personal delivery; however, if time is of the essence, the Consultant may scan and send the Agreement as an email attachment and provide the originals at a later date.***

b. When you have the Agreement as well as all of the other required documents, route them to the Purchasing Department, *attn. Todd C. Nelson*, for final review and execution by STC after which a fully executed copy will be sent or delivered to the Consultant. If the Consultant would like to have an fully executed original Agreement, the Consultant should provide two sets of the original so that STC can sign and date both sets and return one to the Consultant.