

# Distinguished Lecture Series Checklist

- Accountant
- Section A includes all expenses paid directly to the speaker, and that total matches the “Compensation” noted on the EZ Independent Contractor Agreement.
  - All transportation is in accordance with SSU’s travel policy and procedures ([4.10](#), [4.10:1](#) and [4.10:2](#)). Travel by common carrier is at the lowest available rate.
  - Mileage is as listed on the Controller’s website.
  - Meals are at [per diem rates](#), as posted on the Controller’s website, with any provided meals excluded.
  - Lodging is listed in Section A, if speaker is reserving own room (e.g. at the airport) or in Section B, if SSU is reserving and paying for a [local](#) reservation.
  - All other expenses are listed in Section B.
  - Printing Services —Quote for DLS posters?
  - Event & Conference Services—Charge for the use of the room or for custodial set-up or tear-down, before and after the event?
  - Sodexo—Catering quote?
  - Office of Communications—Quote for advertising?
  - Accountant initials Budget Worksheet and forwards it to [potworth@shawnee.edu](mailto:potworth@shawnee.edu).**
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- Office of the Provost
- All boxes at the top of the EZ Independent Contractor agreement are complete and accurate.
  - The Scope of Work includes a notation that the agreement is part of the Distinguished Lecture Series,
    - Title of the speaker’s presentation is included.
    - Time and date the speaker is expected to arrive on campus is provided.
    - The number of hotel room(s) needed, if any, is noted, along with the specific date(s) of the hotel stay.
  - Time and date of presentation are noted.
  - Location of presentation is noted.
  - Compensation is noted and matches the subtotal listed for Section A of the Budget Worksheet.
  - Return Budget Worksheet to nominating faculty member, for submittal to DLS Committee for consideration.
  - EZ IC Agreement is saved by OP until notice of awards is received from chair of DLS Committee.
  - When notified of DLS award, OP double-checks the agreements**, to confirm which contracts were awarded and for what dollar amount.
  - Do agreements fall within the amount awarded? Change agreements, if necessary, in consultation with faculty member.
  - Are the dates as approved by OP? Change if necessary, in consultation with faculty member.
  - Reserve local hotel room for night(s) requested and confirm cost of reservation.. Be sure the Holiday Inn notes that this is a “**room only**” reservation.
  - Provost affixes his/her digital signature to EZ IC agreement and forwards agreement and Budget Worksheet to [contracts@shawnee.edu](mailto:contracts@shawnee.edu).

- One week prior to the event, OP should initiate the speaker's check** via an SSU Request for Payment form submitted to Procurement Services, noting that the check will be picked up from Procurement Services, rather than mailed. Copies of the executed agreement and completed DLS Budget Worksheet should be attached to the RFP.
- After the event, the Office of the Provost coordinates payment** of all DLS-related expenses from budget account 10-5010-6050-1125.
- OP works with Bursar's Office to obtain reimbursement from the Foundation and to have those funds deposited into the correct university budget account.

**Contracts Management**

- Contracts Management double-checks to be sure all information on the EZ IC is complete and accurate.
- Subtotal of Section A, Budget Worksheet, matches "compensation" on EZ IC.
- Provost has digitally signed the agreement.
- Provost's printed name and title appears correctly on the EZ IC form.
- CM forwards partially signed agreement to speaker, along with an OPERS form.
- CM hand-carries OPERS form to Jenny Carver when it arrives.
- CM obtains VPFA digital signature in EZ IC.
- CM returns executed document to speaker with cc to faculty member sponsor, [potworth@shawnee.edu](mailto:potworth@shawnee.edu), [jyandeusen@shawnee.edu](mailto:jyandeusen@shawnee.edu), and [pcarson@shawnee.edu](mailto:pcarson@shawnee.edu) .

**Faculty Member Sponsor**

- The day of the event, the faculty member sponsor** may pick the check up from Procurement Services and present the check to the speaker at the conclusion of the presentation.

Questions related to this checklist should be directed to Contracts Management at 740.351.3265.

OFFICE USE ONLY		
Accountant Initials _____	Office of the Provost Initials _____	Contract Management Initials _____