

# Contract review and payment process for Distinguished Lecture Series awards

These step-by-step instructions will guide you through the contract review and payment process associated with your Distinguished Lecture Series award from the Shawnee State University Development Foundation.

## Before submitting your proposal to the DLS committee for review

Step 1 **Nominating faculty member completes an [EZ Independent Contractor Agreement](#) and a [DLS Budget Worksheet](#)**, after discussion with the intended speaker.

Keep in mind that transportation, lodging, and meals are provided in accordance with SSU's travel policy and procedures ([4.10](#), [4.10:1](#) and [4.10:2](#)). Meals are set at [per diem rates](#), which are posted on the Controller's website.

All fees and expenses paid to the speaker will be in one lump sum payment, in the form of a check, at the conclusion of the speaker's presentation. All expenses, including local lodging and printing of posters, should be charged to budget account 10-5010-6050-1125. The Provost is the budget authority for this account, so his name and title should be entered, where indicated on the EZ Independent Contractor Agreement.

### Notes Regarding the DLS Budget Worksheet

- ▶ Section A includes all expenses paid directly to the speaker, and that total must match the "Compensation" noted on the EZ Independent Contractor Agreement.
- ▶ All other expenses should be listed in Section B.
  - Contact Printing Services to obtain a quote for DLS posters.
  - Contact Event & Conference Services to see if there will be a charge for the use of the room or for custodial set-up or tear-down, before and after the event.
  - Contact Sodexo for quote for catering, if desired.
  - Contact the Office of Communications to determine if there are any charges for advertising.
- ▶ The budget account number, to which all expenses will be charged, has been entered into Section C for you, (Object code 6050 should be used for all expenses related to this award.)

### Notes Regarding the EZ Independent Contractor Agreement

- ▶ [Instructions](#) for completing the EZ Independent Contractor Agreement have been posted online.
- ▶ At a minimum, the Scope of Work should include:
  - A note that this speaker is part of the Distinguished Lecture Series.
  - The title and length of the speaker's presentation.
  - The time and date the speaker is expected to arrive on campus.
  - The number of hotel rooms needed, if any, and the specific date(s) for which the room(s) should be reserved.
- ▶ There are other areas on the form for noting the location, time, and date of the presentation, amount of compensation, and contact information. Please be sure all requested information is provided.

- ▶ The Distinguished Lecture Series budget account number is 10-5010-6050-1125, and the Provost has budget authority for that account. Please enter his name and title where indicated on the form.

**Step 2** The nominating faculty member emails the completed, but **unsigned**, EZ Independent Contractor Agreement and DLS Budget Worksheet to Finance and Administration at [dmckenzie@shawnee.edu](mailto:dmckenzie@shawnee.edu).

**Step 3** An accounting staff member will review the budget worksheet for accuracy and completeness and will email both documents to the Office of the Provost at [potworth@shawnee.edu](mailto:potworth@shawnee.edu).

**Step 4** Office of the Provost (OP) staff members will review both documents and will return the DLS Budget Worksheet to the nominating faculty member via email. OP will save the EZ Independent Contractor Agreement until notification of DLS awards are made (see Step 1 in next section).

**Step 5** The nominating faculty member submits their proposal, which includes the **DLS Budget Worksheet returned to them by the Office of the Provost**, to the DLS committee, for consideration.

### Upon award by DLS (At least 30 Days Prior to Event)

**Step 1** The Chair of the DLS committee emails a list of the selected speakers' names, titles of presentations, dates of events, faculty member sponsors, and amounts awarded to the Development Foundation at [kboggs@shawnee.edu](mailto:kboggs@shawnee.edu), with copies to:

- ▶ The Office of the Provost at [potworth@shawnee.edu](mailto:potworth@shawnee.edu)
- ▶ Contracts Management at [contracts@shawnee.edu](mailto:contracts@shawnee.edu)
- ▶ Finance and Administration at [jburke@shawnee.edu](mailto:jburke@shawnee.edu)
- ▶ Each of the nominating faculty sponsors (unless previously notified).

**Step 2** Finance and Administration will load the total cost of all speakers approved by the DLS committee to the DLS account established in the OP's budget account 10-5010-6050-1125.

**Step 3** OP will review the saved EZ Independent Contractor Agreements to ensure they are as awarded by the DLS Committee. Any changes necessary will be made by the OP. The Provost will sign the EZ Independent Contractor Agreement for the approved speakers and will forward the related agreements to [contracts@shawnee.edu](mailto:contracts@shawnee.edu).

**Step 4** Contracts Management (CM) will review the agreements to ensure they are accurate and complete, before emailing them to the speakers for signature and completion of an Independent Contractor Acknowledgement (a form required by OPERS). Upon receiving the signed agreement and OPERS form back from the speaker, CM will obtain the final authorizing signature, give the OPERS form to the Controller's Office, and return a copy of the executed agreement to the speaker, the faculty member sponsor, and the Office of the Provost.

**Step 5** **One week prior to the event, the speaker's check should be initiated** by the Office of the Provost via an SSU Request for Payment (RFP) form submitted to Procurement Services, ADMIN 197, noting on the RFP that the check will be picked up from Procurement Services, rather than mailed. Copies of the signed agreement and the completed DLS Budget Worksheet should be attached to the RFP.

Step 6 **The day of the event, the faculty member sponsor** may pick the check up from Procurement Services and present the check to speaker at the conclusion of the presentation.

## After the event

Step 1 **The Office of the Provost** coordinates payment of all DLS-related expenses from the budget account number established for that purpose. Submit receipts for all expenses listed in Section B of the DLS Budget Worksheet to the Office of the Provost, after the event. OP staff members will work with the Bursar's Office to obtain reimbursement from the Foundation and to have those funds deposited into the correct university budget account.

Questions related to these instructions should be directed to Contracts Management at 740.351.3265 or to [contracts@shawnee.edu](mailto:contracts@shawnee.edu).