

## Community Consultant Contracting Process

1. Invitation & Communication (interest/concept)
2. Follow Up Meeting with Org to plan/confirm contract term details
3. Contract language on paper
4. Contracting Paperwork Collection/submission
5. Double check paperwork confirmed by budget office
6. Activity
7. Invoice & Payment
8. Follow up & Assessment
9. Rinse repeat

### Step 1. Invitation & Communication

Invitation to talk first makes a HUGE difference in outcomes. Start with a relationship building meeting. Learn about their work and constituents. Ask about the historical relationships and assumptions about each other, what communication should look like for both parties, what level of codesign and consistency is desired. Tell them plainly and honestly what your intent is and why and tell them what you can offer and listen if there's something else that would make the relationships more reciprocal and culturally appropriate for both of you.

#### *(Sample initiation email)*

Hello and beautiful day to you Gladis,  
Seattle Public Schools has a proposal for you. We would like to see if your organization is interested in contracting & collaborating with our Stakeholder Engagement team this summer.

We are aiming to develop targeted spaces and communication campaigns to better reach diverse communities in Seattle about returning to school in person. We have funding to pay for your work and dedicated staff to support and connect along the way.

#### **So what's this summer collaboration & contract about?**

We know there is a need to try new unique and culturally relevant ways to get clear and meaningful information out and back around this issue because families and youth are worried and feel often let out of the conversation. Your group works with the communities we need to do better at reaching consistently and meaningfully. We would be honored to build our connections with you further as a department and to learn from your expertise on how you approach outreach to our families and youth about this huge transition. We are reaching out to build a group of 20 organizations or so also doing this work across the city. We'll have a few meetings in the summer to bring us all together and to build our collective visions & connections. This is just an introduction to the idea, but would love to get connected asap and talk more to see if you are interested in contracting and collaborating with us.

First step, lets meet!

Please let me know times and dates June 3<sup>rd</sup> – June 10<sup>th</sup> you or your team would be available to talk more with our team. Any Questions or want to schedule over the phone call/text me at 360-486-4160.

Heads up, I'll also call your office later today/ tomorrow if I miss you just encase email isn't your thing or you're buried in messages as I often am. If you have a different preferred communication space let me know and I'm happy to @ you wherever fits you and your team best.

Look forward to hearing from you and hope we get to work together this summer.

## **Step 2. Follow up after meeting:**

Make sure you left your meeting on similar terms. Sometimes communication could be off or when working with communities not often contracting this may be a way to help them feel more established and respected for their work even if filling out paperwork isn't their strength. Reducing barriers for the brilliance of our peoples is our goal yeah?

### *(Sample Follow up email)*

Thank you for your time today Dehabe,

I look forward to learning more about you each and your work. Sounds like an exciting summer already planned that will be rich with opportunities to partner. I have included here the [application process](#) as well as an [example document](#) so you can see some of the thinking and depth that is needed. Please let me know if you have any questions or want support applying.

Also I took notes on some of the ideas I heard you bring and added some that might fit our shared goals from our brainstorming today:

- Provide Seattle Teachers, Youth & Families Cultural competence training
- Collaborate with SPS to provide family & youth return to school orientation
- Family meetings having sps staff come in at families request and to collect questions & concerns
- Hire a volunteer to help with getting everyone there and getting the word out
- Communication Updates & connections with Youth Tutoring Program
- Youth Mentor to prepare for return to schools

## **Step 3. Review Proposal/Terms of Service on paper**

Receive & Review anything they provide as their goals. Just make sure it aligns and they have the support and information they need to be successful. Some folks take lots of poking and prodigy and reframing others get it the first go.

Once it feels good *then* set them up with the contracting paperwork. You may have to backout if you don't get basic aligned plans. Easier to do before diving into contract paperwork. Make sure you're ready here before the next step.

## **Step 4. Contracting Paperwork**

You will need to send a gather of all of these forms to Melissa Nguyen. Accounting/Personal Services Contract Specialist [mnguyen@seattleschools.org](mailto:mnguyen@seattleschools.org) T: 206.252.0270

- [PSC packet](#)
- IRS Tax Determination or Business License (*Scan, photo, digital*)
- [W9](#)
- Proposal to serve as Attachment for Section B/C ([Proposal/Plan Example](#))
- [Employee vs. Contractor form](#)
- [Bargaining Unit form](#)

Please let us know if there are questions or if I've missed a step in the form preparation.

**Link to form & rules:** <https://www.seattleschools.org/departments/community-partnerships/forms/>

Personal Service Contract Sample Email

Beautiful day to you Luzviminda,

Thank you again for working with us throughout July and August on our community outreach and engagements. Your proposal has been approved now it's time to get the paperwork for payment together. Attached is some paperwork that we need for our records to get payment out to you at the end of August after contract is complete. I may ask you for an invoice once finished with projects, if that's the case I will send a template to simplify that process hopefully for you.

Attached you'll find a [Personal Services Contract](#) for the engagement contract you'll be leading. I've highlighted parts you need to fill out and filled the rest out for you.

[\(Highlighted\) \(Sample\)](#)

Can you please review the documents and fill in the highlighted sections:

- Contact information on pg. 1
- Federal ID, Title, and Date on the bottom of pg. 3
- Signature on the bottom of pg. 3 –

Attached and include:

- [Form W9](#)
- Copy of Business license (scan, photo, or digital copy)
- [Employee vs. Contractor form](#)
- [Bargaining Unit form](#)

For signatures, you can either sign it digitally, print and sign, or send back to me without signature and then I can get it all prepped for digital signature in adobe and send back to you.

Having trouble viewing or navigating these documents please just call me directly at 360-486-4160 as I am more than happy to help you navigate them and problem solve with you. Appreciate you figuring out bureaucracy with me.

**Please email this information and completed documents to [kkblackhorn@seattleschools.com](mailto:kkblackhorn@seattleschools.com).**

Reporting & Documentation Questions:

We do not have any financial reporting needs. Your proposal was accepted as your invoice including up to \$7500 in services provided for planning and implementing your project. Unless otherwise discussed, the total requested will be paid in full end of August with a invite to talk further about “how did it go” and “what’s next for us” kind of reflective exit survey or meeting.

All contact details are the same as noted in the proposal and in our original outreach information. I’ve also included and will follow up with more information on what the bulk of the message about returning to schools is that we have to share with families (flyer attached).

Please send the required documentation for the contract at your earliest convenience but no later than two weeks from today. Once received, I will set up our first one on one time with your group for planning. If you have an event planned and a date and time set with myself, or our Director Kirk Mead we will be in attendance. More details next week on those points and look forward to talking more. Let me know if you have any further questions!

### **Step 5. Double check your paperwork went in okay**

They might not tell you and then you run the risk of having to do an affidavit and hope you can still pay them. Form encase you mess up paperwork step order like I did twice :/

Can’t do the activity until everything is in. Think 2-3 week process here depending on time of year staffing and capacity.

### **Step 6. Do the thing!**

You’re gonna have to do the payment part next so I advice you get your invoice, proof of services (photos, flyers, data, deliverables etc) and all those details together in advance especially if working with multiple contracts at a time or a service provider that is reliant on a swifter payment. These things happen slowly so every little thing you can do in advance helps.

Like washing dishes while you cook.

### **Step 7. After Services - Contractor Payment Time!**

1) After services have been rendered, the contractor will submit an invoice to the contract originator. Invoices may be submitted not less than monthly. Invoices must include enough information so that a third party could understand it without an explanation. Invoices must relate to the services

described in the approved contract, showing benefit to the District from these services. Invoice details should include:

1. Name and address of contractor
2. Date of invoice
3. SPS Purchase Order or contract number
4. Name & address of district location/students/staff served
5. Detail description of services which itemizes:
  - a. Dates and number of hours for hourly rate contracts
  - b. Dates and times of services for professional development contracts paid by session
  - a. Rates as specified in contract
  - b. Adequate documentation of activity for each day
  - c. Progress on deliverables as enumerated in the contract

Any reimbursable expenses included on the invoice must be supported by detailed original receipts

2) After reviewing the invoice to determine that the services were completed satisfactorily and were in line with the contract, a Certification of Services Rendered Form must be fully completed and signed by the originator.

3) The original invoice and Certification form are submitted to PSC Desk in Accounting (Mail Stop 33-343).

4) Accounting will mail the payment to the contractor to meet standard 30 day payment terms. Please allow seven to ten working days to process payment before the invoice is due.

Send to: Melissa Nguyen Accounting/Personal Services Contract Specialist  
Inguyen@seattleschools.org

T: 206.252.0270

### **Step 8. Follow up**

Talk with them about how it went.

How did it go? Want to team up again theoretically? If so what can we do to make the next time a better experience for both of us? If we are equals, how do we show up next time to feel that way? How was power and decision sharing? Was that a good level of support, codesign, getting out of your way etc

### **Step 9. Rinse & Repeat**

#infinity Thank any admin,business folks, colleagues that helped you along the way! Maybe buy coffee for the comrade that listened to you vent about how long this process is too. Cause if you found this frustrating you are absolutely right and good job making it through anyway.