

Independent Consultant Checklist

Sonoma County Office of Education

Instructions: Check items that are true for the consultant you intend to hire.

Consultant: _____ Service provided: _____

- No instructions:** The consultant will not be required to follow explicit instructions to accomplish the job. (SCOE may provide job specifications, however.)
- No training:** The consultant will not receive training provided by SCOE. The consultant will use independent methods to accomplish the work.
- Work not essential to the employer:** SCOE's success or continuation does not depend on the services of the consultant.
- Right to hire others:** The consultant is being hired to provide a result and will have the right to hire others for actual work.
- Control of assistants:** Assistants hired at consultant's discretion; the consultant is responsible for hiring, supervising, and paying assistants.
- Not a continuing relationship:** If frequent, work will be at irregular intervals, on call, or whenever needed.
- Own work hours:** Consultant will establish his/her own work hours for the job.
- Time to pursue other work:** Since specific hours are not required, consultant may work for other employers simultaneously.
- Job location:** Consultant controls job location; no direction or supervision is provided, whether at SCOE or not.
- Order of work:** Consultant, rather than employer, determines order or sequence of steps in performance of work.
- No interim reports:** Only specific predetermined reports defined in the contract document are required.
- Basis of payment:** Consultant is paid by the job, rather than time expended. Total compensation is set in advance of starting the job.
- Business expenses:** Consultant is responsible for incidental or special business expenses.
- Tools and equipment:** Consultant furnishes the tools and equipment needed for the job.
- Significant investment:** Consultant can perform services without using SCOE facilities. Consultant's investment in his/her own trade is real, essential, and adequate.

Possible profit or loss: Consultant does the following (check valid items)

- Hires, directs, and pays assistants;
- Has equipment and facilities;
- Has continuing and recurring liabilities;
- Performs specific jobs for prices agreed upon in advance;
- Is affected by own business reputation.

Services available to the general public: (check valid items)

- Maintains an office;
- Business license;
- Business signs;
- Advertises services;
- Lists services in business directory;
- Other (explain) _____

- Limited right to discharge:** Consultant is not subject to termination as long as contract specifications are met.
- No compensation for noncompletion:** Consultant is responsible for satisfactory completion of job; no compensation is provided for noncompletion.

Budget Manager _____ Date _____