



UC San Diego Policy & Procedure Manual

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PURCHASING

Section: 523-10.1 EXHIBIT A

Effective: 06/15/1989

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EXHIBIT A

UNIVERSITY OF CALIFORNIA, SAN DIEGO INDEPENDENT CONSULTANT AGREEMENT

AGREEMENT NO. _____

This agreement to furnish certain consulting services is made as of _____, 19____ by and between **THE REGENTS OF THE UNIVERSITY OF CALIFORNIA**, a California public corporation (hereinafter called "University") and _____ hereinafter called ("Consultant").

The terms and conditions attached are hereby made a part of this agreement, by execution of the agreement by both parties.

I. NATURE OF SERVICE

A. Consultant shall furnish to University the following described services:

B. Report or Documentation:

Required Yes _____ No _____

If yes, Consultant shall provide reports and or documentation as described below (include number of copies and due date).

C. Place(s) of performance will be:

D. Based on the provisions under section V. of the Independent Consultant Agreement, does consultant need to provide a Certificate of Insurance?

Yes _____ No _____

If so, is it included with the submittal of this agreement? Yes _____ No _____

E. The University will provide working space, equipment, furniture, utilities, and services, as follows:

F. If applicable, the services of Consultant will assist University in the performance of contract/Grant Number _____ sponsored by

_____ dated _____

(agency name)

Requesting unit certifies that agency/fund approval has been obtained for these consultant fees.

University of California San Diego Policy – PPM 523 – 10.1 Exhibit A
PPM 523 – 10.1 Independent Consultants Exhibit A

G. Consultant shall use recording devices in discussions with University employees only when the University so authorizes; this authorization shall be in writing. If applicable, Consultant's use of recording devices in such discussions is proposed as follows:

H. Total dollar amount paid to the consultant during the past twelve (12) months by the combined campuses of University of California. \$ _____.

II. TERMS OF AGREEMENT

A. The period of performance for this agreement shall be from _____ (month/day/year) through _____ (month/day/year).

B. Either the University or the Consultant may terminate this agreement at any time by giving the other written notice of such action.

III. COMPENSATION

A. University will pay fees on the following basis to Consultant for services performed:

- | | |
|----------------------------------------------|----------|
| 1. Fee of \$ _____ per day/hour _____ | \$ _____ |
| for _____ days/hours: _____ | |
| 2. Per diem at \$ _____ for _____ days _____ | \$ _____ |
| 3. Travel (specify) _____ | \$ _____ |
| 4. Other (specify) _____ | \$ _____ |

MAXIMUM TO BE PAID UNDER THIS AGREEMENT:

TOTAL \$ _____

B. PAYMENTS

1. Request for payment is to be submitted to the Accounting Office. If the request for payment is submitted in the form of an invoice and the invoice represents the final payment, it must be submitted with the Certificate of Completion.
2. Payment will be made submission of an invoice by Consultant via the requesting unit, indication the Agreement Number and setting forth charges in accordance with rates detailed in paragraph A. above. The invoice must include the Consultant's Federal Taxpayer Identification Number and be approved by the University representative having signature authorization for the account and fund to be charged.
3. No payments will be made in advance of work performed, except as specified in the agreement. Final payment will be withheld pending evidence that work has been completed as evidenced by the Certificate of Completion.
4. Invoices shall be submitted to:
University of California, San Diego
Accounting Office, Q-027
La Jolla, California 92093
5. The undersigned Consultant hereby certifies that the fee shown in Paragraph III.A.1 above is no more that his normal charges for the nature of the services to be provided to any other public institution or private client.

IV. NOTIFICATION

A. In performing consulting services hereunder, Consultant shall report to:

University of California San Diego Policy – PPM 523 – 10.1 Exhibit A
PPM 523 – 10.1 Independent Consultants Exhibit A

B. Name and mailing address of Consultant:

V. RECORDS MAINTENANCE

An executed copy of the Independent Consultation Agreement will be maintained by the Office of Records, (Purchasing Division/Responsible Administrative Official), and the Accounting Office.

VI. APPROVALS

CONSULTANT		THE REGENTS OF THE UNIVERSITY OF CALIFORNIA	
(Signature)	(Date)	(Signature) Executing Officer	(Date)
(Street Address)		Title and Name of Executing Officer	
(City)	(State/Zip Code) *	Name of Requesting Unit	
Social Security or Federal Taxpayer Identification Number		Account/Fund No. to be Charged	
(Telephone Number)		Contract/Grant No. and Agency Name	
		Department Contact, Phone, Mail Code for Invoice/Agreement Processing	

AS RESPONSIBLE ADMINISTRATIVE OFFICIAL, I CERTIFY THAT THE INTENT OF UCSD POLICY, PPM 523-10.1, HAS BEEN MET, GIVEN THE INFORMATION AND FACTS PROVIDED.

 Name of Responsible Administrative Official

 Signature Date

***Pursuant to Federal Privacy Act of 1974, you are hereby notified that disclosure of your social security number is mandatory. Disclosure of the social security number is required pursuant to Sections 6011 and 6051 of Subtitle F of the Internal Revenue Code and Regulation 4, Section 404.1256, Code of Federal Regulations, under Section 218, Title II of the Social Security Act, as amended. The social security number is to verify your identity. The principal uses of the number shall be to report payments to Federal and State governments.**

Retention Period:

Five (5) years following end date of Independent Consultant Agreement, subject to Federal contract and grant requirements.

- Office of Record, (Purchasing Division/Responsible Administrative Official)
- Accounting office
- Executing officer

Zero-Five years for all other copies