

LOS RIOS COMMUNITY COLLEGE DISTRICT

PURCHASING: (916) 568-3071 ACCOUNTING: (916) 568-3065
 FAX: (916) 568-3145

PURCHASE ORDER NO 0001075725

PLEASE SEE REVERSE SIDE FOR SPECIAL INSTRUCTIONS, TERMS AND CONDITIONS.

Date	Revision	Page
04/14/2014		1
Payment Terms	Freight Terms	Ship Via
NET 30	Shipping Point	Best Metho
Reference:	Location / Dept	
1005933 WILLIAMSD POONV	04ADMN PRES	

Vendor: 0000035062
 LEE CONSULTING
 3098 N. MOUNT CURVE AVE.
 ALTADENA CA 91001-1750

Phone: (626) 797-3372
Fax: (626) 794-6344

email: MATTHEW@MCLEECONSULTING.COM

Ship To: FOLSOM LAKE COLLEGE
 RECEIVING
 10 COLLEGE PARKWAY
 FOLSOM CA 95630
 United States

Bill To: 1919 Spanos Court
 Sacramento CA 95825-3981
 United States

Tax Exempt? N

Line-Sch	Item/Description	Quantity	UOM	PO Price	Extended Amt	Due Date
1- 1	CONSULTING SERVICES PAYMENT REQUIREMENTS: \$6,000 WILL BE INVOICED ON DATE THE WORK BEGINS, DUE IN 30 DAYS	1.00	JOB	6,000.00	6,000.00	04/28/2014
2- 1	ESTIMATED TRAVEL FOR CONSULTING SERVICES TWO 2-DAY VISITS COPIES OF RECEIPTS FOR ALL CHARGES WILL BE SUBMITTED WITH FINAL INVOICE.	1.00	JOB	2,200.00	2,200.00	04/28/2014
3- 1	CONSULTING SERVICES BALANCE \$7,350 INVOICED ON SUBMISSION OF REPORT, DUE IN 30 DAYS	1.00	JOB	7,350.00	7,350.00	04/28/2014

SERVICE AGREEMENT # 45051 DATED 4/1/14

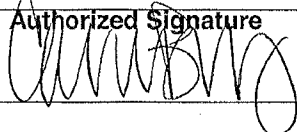
Sub Total Amount	15,550.00
Sales Tax Amount	0.00
Total PO Amount	15,550.00

BU	Acct	Fd	Org	Prog	Sub	Proj	Amount	BYear
GENFD	5100	11	FL.CP.OFFC	60100	00000	101E	15,550.00	2014

0001005933KIRKLINK01-APR-2014

Verification of this purchase order can be made using the Los Rios Community College District web site listed below.

All shipments, invoices, and correspondence must be identified with our Purchase Order Number. Overshipments will not be accepted unless authorized by Buyer prior to shipment.

Authorized Signature

 4/16/14

Notice to vendor: You are responsible for delivering goods and delivery documents to the Receiving Department at the site. Failure to do so will delay payment processing. Vendor is responsible for obtaining verification of delivery by authorized Receiving Room personnel. Receipt of goods by other parties and failure to obtain authorized signatures may also delay payment. NOTE: PAYMENT TERMS NET 30 MATERIAL SAFETY DATA SHEETS (MSDS) must be provided with the delivery of product as required by law.

LOS RIOS COMMUNITY COLLEGE DISTRICT

American River College • Cosumnes River College • Folsom Lake College • Sacramento City College

PURCHASE ORDER TERMS AND CONDITIONS

1. **APPLICABLE LAW:** The contract resulting from this order shall be governed by the laws of the State of California
2. **COMPLETION OF ORDERS:** LRCCD reserves the right to withhold payment until order is completed.
3. **DISCOUNTS:** Please show cash payment discount offered on your invoice in connection with any discount offered, time will be computed from date of delivery of the supplies or equipment, or from date correct invoices are received in the office specified by LRCCD if the latter date is later than the date of delivery. Payment is deemed to be made for the purpose of earning discount, on the date payment is mailed or on behalf of LRCCD.
4. **INVOICES:** Invoices shall be prepared and submitted in duplicate unless otherwise specified. Invoices shall contain Purchase order number, date, description of items, sizes and quantities, unit prices, extended totals, place and date of delivery. Invoices or vouchers not on printed bill heads shall be signed by the CONTRACTOR or person furnishing the supplies or services. Every invoice shall be properly itemized. If LRCCD has not received billing for product or services within a one year period LRCCD will not be held responsible for satisfying the debt.
5. **CHANGES:** No change or modification in terms, quantities, or specifications may be made without express authorization in writing from the LRCCD Purchasing Office and signed by the parties hereto, and no oral understanding or agreement not incorporated herein shall be binding on any of the parties hereto. If unit cost of any item exceeds the amount shown by 10% or \$250.00 whichever is less do not ship. Contact LRCCD Purchasing at the phone number provided.
6. **BILL OF LADING:** If Bill of Lading is applicable to this order, send originals to "Ship to" address and duplicate Bill of Lading with invoices to "Bill to" address. All correspondence, invoices, bills of lading, shipping memos, packages, etc., must show purchase order number. If factory shipment, advise factory to comply.
7. **TRANSPORTATION CHARGES:** Invoices for prepaid transportation charges must be supported by original receipted expense bills.
8. **FOB POINT AND FREIGHT CHARGES:** Unless otherwise specified on this order, all items shall be delivered FOB Destination. No charge for delivery, drayage, express, parcel post, packing, cartage, insurance, license fees, permits, or for any other purpose will be paid by LRCCD unless expressly included and itemized in the order. Unless otherwise shown, on "FOB Shipping Point" transactions, CONTRACTOR shall arrange for lowest cost transportation, prepay and add freight to invoice and furnish supporting freight bills if the amount exceeds \$50.00. On "FOB Shipping Point" transactions, should any shipments under this purchase order be received by LRCCD in a damaged condition and any related freight loss and damage claims filed against the carrier or carriers be wholly or partially declined with the inference that damage was the result of the act of the shipper such as inadequate packaging or loading or some inherent defect in the equipment and/or material, CONTRACTOR on request of LRCCD shall at CONTRACTOR's own expense assist LRCCD in establishing carrier liability by supplying evidence that the equipment and/or materials was properly constructed, manufactured, packaged, and secured to withstand normal transportation conditions. Shipments that are California intrastate in nature and where freight is to be borne by LRCCD shall be tendered to carriers with written instructions that rate and charges may not exceed the lowest lawful rates on file with the California Public Utilities Commission.
9. **PATENT INDEMNITY:** The CONTRACTOR shall hold LRCCD, its officers, agents and employees harmless from alleged liability of any nature or kind, including costs and attorney fees and expenses, for infringement or use of any copyrighted or uncopyrighted composition, secret process, patented or unpatented invention, article or appliance furnished or used in connection with the contract or purchase order.
10. **TAXES:** Certain articles sold to LRCCD are exempt from certain Federal excise taxes. LRCCD will reimburse the CONTRACTOR for, or pay directly, all California State and local sales and use taxes applicable to this purchase.
11. **EQUAL OPPORTUNITY EMPLOYER:** The acceptance of this purchase order by a supplier of goods and services is a certification that such supplier complies with all provisions of executive order 11246 and is an equal opportunity employer.
12. **GENERAL SAFETY ORDERS:** All materials, supplies and services sold to LRCCD shall conform to the general safety orders of the State of California. All materials, except as otherwise specified, must be new and of the best quality of their respective kinds.
13. **INDEMNIFICATION:** CONTRACTOR shall indemnify, defend and hold harmless LRCCD, its trustees, officers, agents, employees and volunteers, from any and all claims, demands, suits, causes of action, damages, penalties, breaches of this agreement, infringement of patent rights, costs, expenses, violations of employee occupational health and safety laws, attorney fees, losses or liability, property damage, personal injuries to or death of persons, arising out of, alleged to have arisen out of, or relating in any way to CONTRACTOR's work to be performed under this agreement, except if caused solely by the negligence of LRCCD.
14. **TERMINATION:** LRCCD may terminate this agreement and be relieved of the payment of any consideration to CONTRACTOR should CONTRACTOR fail to perform the covenants herein contained at the time and in the manner herein provided. In the event of such termination LRCCD may proceed with the work in any manner deemed proper by LRCCD. The cost to LRCCD shall be deducted from any sum due the CONTRACTOR under this agreement and the balance if any, shall be paid the CONTRACTOR upon demand.
15. **ASSIGNMENT:** Without the written consent of LRCCD, this agreement is not assignable by CONTRACTOR either in whole or in part.
16. **PUBLIC WORKS PROJECTS:** CONTRACTOR must comply with Public Contract Code.
17. **CA LABOR CODE:** Pursuant to Section 1700, and following, the CONTRACTOR shall pay not less than the prevailing rate of per diem wages as determined by the Director of the California Department of Industrial Relations. Copies of such prevailing rate of per diem wages are on file at the Business Office of the Los Rios Community College District, 1919 Spanos Court, Sacramento, CA 95825. Those copies shall be made available to any interested party upon request. The CONTRACTOR shall forfeit, as penalty to the LRCCD, Fifty Dollars (\$50.00) for each calendar day or portion thereof, for each workman paid less than the stipulated prevailing rates for any work done under the contract by him/her or by any subcontractor under him, in violation of the provisions of such Labor Code.
18. **NOTICE:** Your employees may be exposed to hazardous substances during the course of their work while on LRCCD property. For additional information on the hazardous substances that your employees may be exposed to contact the LRCCD General Services Department at (916) 568-3048.
19. **INSURANCE:** CONTRACTOR shall, at all times, maintain in full force and effect the following insurance: Workers' Compensation, Commercial General Liability, Auto Liability, and Professional Liability if licensed professional. Policy limits for each shall be at least \$1,000,000 AND \$3,000,000 AGGREGATE for bodily injury, personal injury and property damage. Any combination of General Liability and Excess Coverage can be combined to meet the Aggregate. LRCCD shall be named as an additional insured on CONTRACTOR's policies. The CONTRACTOR shall provide a certificate of insurance and required endorsements to comply with this section at least 15 days prior to commencement of work under this contract. The certificate shall state that LRCCD will be given 30 days notice of any material change or cancellation in coverage.
20. **DISQUALIFIED EMPLOYEES:** CONTRACTOR shall ensure that persons who perform services on LRCCD property have not been convicted of any felony, or any controlled substance offense or any sex offense as those terms are defined by Education Code section 87008-87010. If LRCCD determines that any person employed by CONTRACTOR to work on LRCCD property is incompetent, unfaithful, intemperate, disorderly, abusive or is otherwise unsatisfactory, CONTRACTOR shall cause that employee to be removed from working on LRCCD property immediately, and that person shall not be employed again on LRCCD property.
21. **WORK AUTHORIZATION:** Prior to LRCCD's acceptance of this Agreement, CONTRACTORS who are not U.S. citizens must provide verification of (a) work authorization status from the appropriate U.S. Department of State; (b) a copy of their U.S. visa; (c) the number of days present in the U.S.; and (d) tax treaty status. LRCCD shall not make any payments to CONTRACTOR unless CONTRACTOR holds the appropriate U.S. visa. CONTRACTOR is responsible for ensuring they are in possession of the appropriate visa.
22. **WARRANTY:** CONTRACTOR expressly warrants that all materials, goods, equipment, services, and/or labor shall conform to the requirements set forth or incorporated into this order and any applicable industry standards or requirements, shall be merchantable and free from defects in workmanship, materials and/or design (including latent defects), and shall perform as specified. CONTRACTOR further warrants that all materials, goods, equipment, services, and/or labor will be fit and sufficient for the particular purposes intended by LRCCD. Unless agreed upon otherwise between LRCCD and CONTRACTOR, the warranty period shall be the longer of: (a) any express warranty included in this service agreement; (b) one year after the materials, goods, equipment, services, and/or labor are accepted by LRCCD; or (c) any warranty period provided under any applicable California law.

Requisition

Vendor: MISCELLANEOUS

 ***** CA 95825
 United States



Ship To: RECEIVING
 10 COLLEGE PARKWAY
 FOLSOM CA 95630

Business Unit: GENFD		APPROVED
Req ID:	Date	Page
0001005933	03/31/2014	1
Requester		Bldg#
David Williams		PRES
Requester Signature		
Buyer: Vivian Poon		
Approved: KIRKLINK 01-APR-2014		

Line-Schd	Description	Quantity	UOM	Price	Extended Amt	Due Date
1-1	CONSULTING SERVICES PAYMENT REQUIREMENTS: \$6,000 WILL BE INVOICED ON DATE THE WORK BEGINS, DUE IN 30 DAYS BALANCE \$7,350 INVOICED ON SUBMISSION OF REPORT, DUE IN 30 DAYS	1	JOB	13,350.00	13,350.00	04/14/2014
2-1	ESTIMATED TRAVEL FOR CONSULTING SERVICES TWO 2-DAY VISITS COPIES OF RECEIPTS FOR ALL CHARGES WILL BE SUBMITTED WITH FINAL INVOICE.	1	JOB	2,200.00	2,200.00	04/14/2014

Total Requisition Amount: 15,550.00

NEW VENDOR:
 LEE CONSULTING
 3098 N. MOUNT CURVE AVE.
 ALTADENA, CA 91001-1750
 PHONE 626.797.3372
 MATTHEW@MCLEECONSULTING.COM

CONFIRMING PO REQUESTED. THANK YOU.

NOTE ((per J. Alford's request): Patrick Perry, CCCCCO Vice Chancellor of Technology, Research and Information Systems; Judy Beachler, CRC Dean of Instruction and Student Learning (retired); and Kevin Bray, Sierra College Dean of Planning and Research (retired). were contacted regarding the need for an independent analysis of the FLC OIR's operational efficiency and workflow. None of these individuals were able to provide the services required. In subsequent discussions, Patrick Perry highly recommended Matthew Lee. Dr. Perry was interested in providing the needed services as a consultant and was then interviewed by David Williams, Dean of IR and the President. He submitted a proposal and the President conducted two reference checks with his previous clients. Based upon the interview, his proposal, and the reference checks, he was selected for this project.

<u>BU</u>	<u>Acct</u>	<u>Fd</u>	<u>Org</u>	<u>Prog</u>	<u>Sub</u>	<u>Proj</u>	<u>Amount</u>
GENFD	5100	11	FL.CP.OFFC	60100	00000	101E	15,550.00

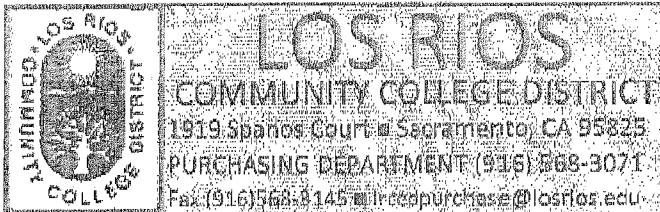
2014 APR - 2 A 10:29
 FLC BUSINESS SERVICES

New Vendor Appl & W9 enclosed

Approval Signature	Approval Signature	Approval Signature
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4/2/14 sent to Dr.

American River College ■ Cosumnes River College ■ Folsom Lake College ■ Sacramento City College



VENDOR APPLICATION

Return signed completed form to Purchasing via fax or email.

NAME: Matthew C Lee

NAME OF FIRM <u>Lee Consulting</u>		FEDERAL ID# OR SOCIAL SECURITY # <u>27 - 4352555 /</u>	
MAILING ADDRESS <u>309B N Mount Curve Ave, Altadena, CA 91001</u>		REMIT ADDRESS <u>Same</u>	
PHONE <u>(626) 797-3372</u>	FAX <u>(626) 794-6344</u>	EMAIL <u>matthew@mcleeconsulting.com</u>	

WEBSITE <u>www.mcleeconsulting.com</u>	ORGANIZATION CLASSIFICATION (Check all that apply)
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AUTHORIZED COMPANY REPRESENTATIVES			ORGANIZATION CLASSIFICATION	
Name	Title/Capacity	Email	(Check all that apply)	
<u>Matthew C Lee</u>	<u>Principal</u>	<u>matthew@mcleeconsulting.com</u>	<input checked="" type="checkbox"/> Individual	<input type="checkbox"/> MBE
			<input type="checkbox"/> Partnership	<input type="checkbox"/> WBE
			<input type="checkbox"/> Non Profit	<input type="checkbox"/> DVBE
			<input type="checkbox"/> Corporation (List State Incorporated)	
			Contractor's License #	
			Collect CA Tax (circle one) Yes No	

PROVIDE LIST OF COMMODITIES, EQUIPMENT, SUPPLIES and/or SERVICES AVAILABLE TO THE DISTRICT		
<u>Consulting: Analysis of institutional research operations</u>		

VENDOR CERTIFICATION	OTHER BUSINESS INFORMATION		
I certify that all statements contained herein are correct. I understand that this information will be used as a basis for evaluating my request to receive bid invitations for purchases. I understand that being placed on the qualified vendor bid list does not in any way represent an endorsement of my firm by Los Rios, nor does it relieve my firm of providing bonds and insurances as required. I further agree to disclose any known or potential conflicts of interest relating to my business and Los Rios. I understand the requirements for fulfilling and invoicing orders. I further certify this firm is an equal opportunity employer.	Payment Terms <u>30 days net</u>	Discounts Extended <u>None</u>	
	Refund/Returns <u>NA</u>		
		<u>Principal</u>	<u>3/21/14</u>
	INITIALS	SIGNATURE	TITLE

LOS RIOS PURCHASING ONLY:
www.losrios.edu



Form **W-9**
(Rev. August 2013)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

Name (as shown on your income tax return)
Matthew C. Lee

Business name/disregarded entity name, if different from above
Lee Consulting

Check appropriate box for federal tax classification:
 Individual/sole proprietor C Corporation S Corporation Partnership Trust/estate
 Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) **P**
 Other (see instructions) **P**

Exemptions (see instructions):
Exempt payee code (if any) _____
Exemption from FATCA reporting code (if any) _____

Address (number, street, and apt. or suite no.)
3098 N. Mount Curve Ave.
City, state, and ZIP code
Altadena, CA 91001-1750

Requester's name and address (optional)

List account number(s) here (optional)

Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Notes: If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.


Social security number								
Employer identification number								
2	7		4	3	6	2	5	5

Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
- I am a U.S. citizen or other U.S. person (defined below), and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here Signature of U.S. person  Date **3/19/14**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. The IRS has created a page on irs.gov/w9 for information about Form W-9. Information about any future developments affecting Form W-9 (such as legislation enacted after we release it) will be posted on that page.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, payments made to you in settlement of payment card and third party network transactions, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued).
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the

withholding tax on foreign partners' share of effectively connected income, and

- Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1445 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1445 require a partnership to presume that a partner is a foreign person, and pay the section 1445 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1445 withholding on your share of partnership income.

LOS RIOS COMMUNITY COLLEGE DISTRICT
SERVICE AGREEMENT

(Information on the purchase order and the back of this form are part of this Agreement. Please read this important information.)

No. 45051

Attachment to Purchase Order No. _____

This Agreement entered this 1st day of April by and between the Los Rios Community College District (District) and (CONTRACTOR) MATTHEW C. LEE, PhD CONTRACTOR No. _____ Social Security No. _____
Business Name (if different) LEE CONSULTING FIN No. 27-4352555
Check One: Sole Proprietorship Partnership _____ Corporation _____ Check One: U.S. Citizen _____ Resident Alien _____ Non-resident Alien _____
Telephone No. (626) 797-3972 (SSN or FIN No. must be provided for payment)
Address 3098 MOUNT CURVE AVE. City and State Zip ALTADENA, CA 91001-1750
Are you now or have you been an employee of the District? Yes _____ No If yes, Date _____ Location _____
Are you related to an employee of the District? Yes _____ No If yes, who _____

GENERAL CONDITIONS:

1. Scope of Work. CONTRACTOR shall perform specific services as set forth below (attach separate schedule if necessary, and reference the attachment). The term of this Agreement is from (date) 4/21/14 to (date) 5/31/14. CONTRACTOR shall perform its services hereunder in accordance with the professional standard of care, skill and diligence customarily followed by consultants performing similar professional services on projects of comparable scope and quality.

Analysis of Institutional Research Operations (See Attached Proposal)

2. Compensation. For its services hereunder, CONTRACTOR shall be paid a sum of money not to exceed \$ 13,500 ^{plus travel expenses} during the term of this Agreement. Payment of this amount shall be made in accordance with established District payment schedules, and is contingent upon the CONTRACTOR submitting an invoice to the District Accounts Payable Office, and upon receipt of verification of services satisfactorily rendered (receiver) by the appropriate College/District Administrator. Payment terms are: N/30 See proposal for sched Payment will be mailed to address on purchase order. CONTRACTOR agrees that none of the terms and conditions associated with its acceptance of this Agreement shall apply to, modify, or be incorporated into this Agreement, and the DISTRICT's acceptance of CONTRACTOR's goods, materials, equipment, services and/or labor or other items covered by or delivered under this Agreement shall not constitute acceptance of any additional or different terms and conditions on behalf of CONTRACTOR.

3. Termination. The DISTRICT shall have the right to terminate this Agreement with or without cause. The District may terminate the Agreement for convenience at any time and for any reason by giving thirty (30) days written notice of such termination to CONTRACTOR. In the event of termination for convenience, CONTRACTOR shall immediately cease rendering services and promptly deliver to the DISTRICT copies of all prepared work product, and CONTRACTOR shall only be entitled to payment for hours actually worked and direct costs incurred, plus a 10% mark-up on direct costs incurred, or the pro-rata share of the contract price, whichever is less. The DISTRICT may terminate the Agreement for cause which shall be effective immediately upon written notice. In the event of a termination for cause, CONTRACTOR shall not be entitled to any further payment, if any becomes due, until the Project is completed. The DISTRICT may proceed with the work in any manner deemed proper by DISTRICT, and all the DISTRICT's costs incurred by the District shall be deducted from any sum otherwise due CONTRACTOR under this Agreement and the balance, if any, shall be paid to CONTRACTOR upon completion of the work. The DISTRICT reserves all rights, including all rights to recover damages, inclusive of attorneys' fees, from CONTRACTOR, in the event of a termination for cause.

4. Integration, Amendments. This Agreement (front & back) and the purchase order constitute the entire Agreement by the parties. No other representations, whether oral or written are part of this Agreement except that the following document(s) are part of this Agreement: Proposal - Analysis of Institutional
All amendments to this Agreement must be in writing and signed by authorized representatives of both parties. Research Operations

5. Independent CONTRACTOR not Agent.

- a. CONTRACTOR, and its agents and employees, in the performance of this Agreement, shall be independent contractor(s) and no relationship of employer-employee exists between these parties and the DISTRICT.
- b. CONTRACTOR shall be responsible for determining the means, methods, or sequence used to complete the work required under this Agreement. CONTRACTOR shall be responsible for and accountable to the DISTRICT for the final product or service to be provided.
- c. If, in the performance of this Agreement, any third persons are employed by CONTRACTOR, such persons shall be entirely and exclusively under the direction, supervision, and control of CONTRACTOR. Except as may be specifically provided elsewhere in this Agreement, all terms of employment, including hours, wages, working conditions, discipline, hiring, and discharging, or any other terms of employment or requirements of law, shall be determined by CONTRACTOR. It is further understood and agreed that CONTRACTOR shall issue W-2 or 1099 Forms for income and employment tax purposes, for all of CONTRACTOR's employees, assigned personnel and subcontractors.
- d. Except as otherwise provided in this Agreement, CONTRACTOR is qualified to accomplish the work required in this Agreement and the DISTRICT will provide no training to CONTRACTOR.
- e. Except as otherwise provided in this Agreement, CONTRACTOR's ability to market or provide services to any other client shall not be limited by the DISTRICT.
- f. Except as otherwise provided in this Agreement, CONTRACTOR is to provide all necessary tools and materials.
- g. Prior to DISTRICT's acceptance of this Agreement, CONTRACTOR shall (a) identify their status as a sole proprietorship, partnership, or corporation, and (b) provide the DISTRICT with a copy of IRS Form W-9, Request for Certification of Federal Taxpayer Identification Number.
- h. CONTRACTOR agrees that, upon request, CONTRACTOR shall provide any documentation requested by the DISTRICT as evidence that appropriate taxes have been paid. If CONTRACTOR fails to pay appropriate taxes or to provide requested documentation, CONTRACTOR hereby agrees to indemnify the DISTRICT against any penalties and taxes levied against the DISTRICT by a taxing agency, and to reimburse the DISTRICT for such penalties and taxes.

Signature below by CONTRACTOR indicates that all parts of this Agreement have been read, understood and accepted.

Name of CONTRACTOR (Printed) MATTHEW C. LEE, PhD - LEE Consulting

Signature of CONTRACTOR [Signature] Date 3/26/14 Requisition # 0001005993

DISTRIBUTION: White: CONTRACTOR Green: Purchasing Canary: Accounting Pink: Business Office Goldenrod: Originator

LOS RIOS COMMUNITY COLLEGE DISTRICT

1919 Spanos Court, Sacramento, CA 95825
Phone (916) 568-3071 FAX (916) 568-3145
Purchasing Department
lrccdpurchase@losrios.edu



Sacramento City College American River College Cosumnes River College Folsom Lake College

CONFLICT OF INTEREST STATEMENT

This is to certify that the undersigned employee(s) has/have no economic interests which may foreseeably be materially affected by having participated in the development of the specifications for service, equipment and/or material represented by the referenced requisition.

(Pursuant to District Regulation R-8323 and District Policy P-8611

This form must be signed and submitted with the Purchase Requisition (GS Form 127) for those transactions listed below.)

- ❖ Sole Source
- ❖ Professional Service Agreements
- ❖ Service Agreements (GS Form 78: Rev. 2/2012)
- ❖ Selection Committee Recommendations (formal process)

READ CAREFULLY BEFORE SIGNING:

Rachel Rosenthal 3/26/14
Employee/Date

Selection Committee Member/Date

Requisition Number

Selection Committee Member/Date

Selection Committee Member/Date

Selection Committee Member/Date

Selection Committee Member/Date

Selection Committee Member/Date

OFFICIAL USE ONLY:	
PURCHASE ORDER#	
BUYER/DATE:	



MATTHEW C. LEE, PhD

Special Projects Consultant
for California Community Colleges

**Proposal
Analysis of Institutional Research Operations**

**To: Rachel Rosenthal, President
Folsom Lake College**
**From: Matthew C. Lee, Ph.D., Principal
Lee Consulting**
Date: February 28, 2014

Brief Description of Needs

- The Folsom Lake College (FLC) Office of Institutional Research (OIR) is only partially fulfilling the research needs of the College.
 - No system is in place to ensure that research is conducted in accord with Collegewide needs or priorities.
 - The Research Analyst sets research priorities, largely independent of supervision. The Office recently has been placed under the authority of a Dean, but the Dean has no background in research. No shared-governance research committees or other structures or processes intended to review or support the work of the OIR exist. So the College is wholly reliant on the judgment and expertise of the Research Analyst regarding the design, content, duration, and resource requirements of research projects.
 - Project completion times and estimated response times for research requests have risen to such a degree that both management and staff have simply stopped asking for research support in too many cases.
 - Resources allocated to research at FLC are roughly equivalent to those allocated at the other Los Rios CCD colleges, all of which are considerably larger than FLC, but the Research Analyst contends that meeting the College's needs more effectively requires the addition of another full-time researcher.
 - The District has its own research operation, which provides some support to the College.
- The College requires the services of an outside consultant to conduct an independent operational analysis of OIR, and to make recommendations to improve and sustain its productivity, efficiency, responsiveness, and timely fulfillment of the research needs of the institution.

ACCREDITATION
INTEGRATED PLANNING
EVALUATION
TROUBLESHOOTING

Discovery, Analysis, and Recommendations for Action

Dates of Services

April 21-May 31, 2014

Note: Completion of the project in the time indicated is contingent on a formal authorization to begin work by the start date shown, and on the validity of the *Assumptions* listed below.

3098 N. Mount Curve Ave.
Altadena, CA 91001-1750
T 626-797-3372
F 626-794-6344
E matthew@mleeconsulting.com

Scope of Services

1. Review and analyze documentation of the existing structures and processes related to institutional research, as document availability and schedules permit. Documentation to be reviewed may include the following:
 - a. Folsom Lake College
 - (1) Most recent OIR program review
 - (2) Institutional research calendar
 - (3) Institutional research agenda
 - (4) Comprehensive list of projects completed during the last 12 months
 - (5) Comprehensive list of projects now in development
 - (6) Documentation of institutional research priority system, if any
 - (7) OIR forms and other documents that support the research request and fulfillment process
 - (8) Latest Key Performance Indicators or equivalent report
 - (9) Other sample OIR reports, both cyclical and ad hoc, and website contents
 - (10) Job descriptions and reporting relationships of OIR staff
 - (11) Documentation of responsibilities of OIR staff outside the Office itself, including but not limited to serving on committees as members or resources, making regularly scheduled or ad hoc presentations, providing training and other support to College personnel
 - (12) Documentation of logistical and information technology support and equipment provided to OIR
 - (13) Documentation of professional development of OIR staff
 - (14) Data dictionaries and other documentation of District and College data resources customarily used by OIR, including access, extraction, and reporting tools
 - b. Los Rios CCD
 - (1) Institutional research calendar
 - (2) Institutional research agenda
 - (3) Sample reports provided to the College, both cyclical and ad hoc
 - (4) Documentation of other District research resources available to the College, if any
 - (5) Delineation of functions between District and College research operations
 - c. Other documentation as needed
2. In one two-day visit, conduct up to eight structured interviews with appropriate personnel regarding College and District structures, processes, and products related to institutional research. Persons and groups to be interviewed may include the following, as the schedule permits:
 - a. College President (up to one hour)
 - b. Dean, Planning and Research/Visual and Performing Arts (up to one hour)
 - c. OIR programmer (up to two hours)
 - d. Up to three frequent or former users of OIR services (up to one hour each); for example:
 - (1) SLO Coordinator or equivalent
 - (2) Program Review Coordinator or equivalent
 - (3) Accreditation Steering, Educational Master Planning, and/or other suitable committee chair(s)
 - e. District research personnel (up to one hour)
 - f. Research personnel from another Los Rios college (up to one hour)
 - g. Other interviewees as mutually agreed upon
3. In the same visit:
 - a. Interview the Research Analyst as needed to gather information on topics such as the following:
 - (1) OIR responsibilities and time commitments, both inside and outside the Office
 - (2) Skill sets of OIR staff, and professional development for improvement thereof
 - (3) Work approaches of OIR staff
 - (4) Outlines of typical projects and tasks, including design, schedule, data access, analysis, reporting, presentations, and client evaluations
 - (5) Use of District-supplied data and reports
 - (6) Relations with other campus and District offices, groups, and individuals
 - (7) Logistical support
 - (8) Perceived needs
 - (9) Other subjects as needed
 - b. Review systems and documentation on-site.
4. Analyze interview results.
5. Prepare and submit to the President a written Report that includes the following components:
 - a. Results of my analysis of OIR operations

- b. Recommendations on concrete actions the College should take to improve and sustain OIR's productivity, efficiency, responsiveness, and timely fulfillment of the research needs of the institution
6. Meet for up to one hour by phone or conferencing tool with the President to discuss the findings and recommendations in the Report, along with possible next steps.

Fee

\$13,350, plus travel expenses (see *Expenses* below).

Payment

- \$6,000 will be invoiced on or about the date on which work under this proposal is authorized to begin, and will be due 30 calendar days thereafter.
- The remaining \$7,350 plus travel expenses will be invoiced upon submission of the Report, on or about May 31, 2014, and will be due 30 calendar days thereafter. Copies of receipts for all applicable travel expenses will be submitted along with that invoice.

Phase II: Additional Consulting Assistance in Implementing Recommendations

If the College wishes, it may request additional consulting assistance in implementing recommendations from the Report. In response, if appropriate and if my own work schedule permits, I will prepare a Phase II Proposal with a detailed Scope of Services based on our discussion of the College's needs at that time.

Assumptions

- Timely access to information is crucial to completion of each phase of this project as specified above.
 - The College and/or District will arrange easy remote access via the Internet to nearly all the documentation I will need (including access to intranets as required), and College and District personnel will supply in timely fashion (i.e., within one working day) the rest of the documentation and other information that I request.
 - College and District personnel will also be cooperative and timely in responding to requests for interview or meeting times, and cooperative in providing information during interviews and meetings.
- Contract processing and payment of invoices will be timely.
- If access to the necessary information is difficult or delayed, or if contract processing or payments are not timely, then progress in the project will be delayed.

Logistical Notes and Requirements

- With the exception of the campus visit specified above, I will provide all services from my offices.
- I expect to make use of email, telephone, and Skype or other conferencing tools as much as possible to optimize the efficient use of everyone's time.
- I will need College clerical support for interview arrangements and the like.
- I will need a meeting room at the College for the on-site interviews.
- I will need a parking permit for my days on campus.

Expenses

- Ordinary office and communication expenses (phone, fax, postage, etc.) are included in the listed fees.
- The College will reimburse me for reasonable travel expenses (typically round-trip airfare, rental car and fuel or other ground transportation, hotel accommodations, and meals).
- All extraordinary expenses are subject to prior approval, and will be billed separately.

Pledge

Should you accept any portion of this proposal, I pledge to provide you with my best advice, based upon my professional experience and judgment. That advice, however, should not be construed to replace the expertise of other professionals such as attorneys, accountants, engineers, or architects, and the decision to act or not to act upon my advice rests solely with Folsom Lake College.

Attachment – B

Los Rios Community College District

TYPES OF CONTRACT SERVICE

A. General Contractors and Specialized Services:

- _____ Aircraft or Air Charter
- _____ Ambulance Services
- _____ Asbestos Abatement
- _____ Food Services and Catering
- _____ General Construction Contracts (Plant or Other Facilities)
- _____ Hazardous Waste Services
- _____ International Study Travel Abroad
- _____ Medical Services (including optical and laboratory)
- _____ Professional Services (Accountants, Actuaries, Architects, Attorneys, Engineers, Financial Services, Insurance, Surveyors)
- _____ Special Events Community Services/Pyrotechnical Displays Transportation Services
- _____ High Voltage Services

B. Building/Grounds and Maintenance Services:

- _____ Building and Grounds Maintenance (Electrical, HVAC, painting, plumbing, roofing, etc.)
- _____ Elevator Maintenance
- _____ Groundskeepers
- _____ Janitor/Custodial
- _____ Special Events Community Services
- _____ Tree Removal/Trimming
- _____ Roadway/Parking Lot Striping

C. Repair, Installation, and Independent Contractors Services:

- _____ Carpet Installation and Cleaning
- _____ Door and Window Services
- _____ Floor Installation, Cost Estimators, Schedule Consultants
- _____ Facilities Planning Consultants, QA Plan Reviewers
- _____ Garage Door Installation, Fence Repairs
- ✓ _____ Independent services contracts (grants writers, professional speakers, trainers, and facilitators, report writers, and evaluation/assessment reports)
- _____ Information Technology
- _____ Locksmith Services
- _____ Shower/Tub and Tile Repair

* Step 1 – Review Attachment A for District insurance coverage requirement.
* Step 2 – Identify type of contractual service to be performed on Attachment B, i.e., A, B, or C above.
* Step 3 – Reference Attachment C to review insurance coverage and limits based on contract type.
* Step 4 – Use the compliance checklist in Attachment D to confirm requirements are satisfied.

Kirklin, Kathleen

From: Matthew C. Lee <matthew@mcleeconsulting.com>
Sent: Wednesday, March 26, 2014 7:49 PM
To: Kirklin, Kathleen
Subject: Travel estimate

Kathleen,

Just got back in the office and received your message. Here's my estimate for a two-day visit, flying into Sacramento the night before:

- Airfare, SWA, Burbank-Sacramento: \$484
- Car rental, fees, and fuel: \$135
- Hotel, fees, and taxes: \$300
- Meals, up to \$50 per day: \$100
- Total per visit: \$1,019

Of course, if fares and rates change, these figures could go up or down. I will provide copies of all bills for reimbursement.

Hope that helps your budgeting!

Matthew

Matthew C. Lee, Ph.D.
Special Projects Consultant for Higher Education
V: 626-797-3372
F: 626-794-6344
www.mcleeconsulting.com

LOS RIOS COMMUNITY COLLEGE DISTRICT INDEPENDENT CONTRACTOR vs. EMPLOYEE CHECKLIST

This questionnaire is to be used to determine if an individual is an independent contractor or employee. The individual should be consulted where necessary to answer all questions. If you believe that the individual qualifies as an independent contractor, submit a requisition, service agreement, checklist, and any explanatory attachments. The contract will not be valid until a Purchase Order is issued, and no agreements should be made nor should work commence before that time. Due consideration should be given to all questions, since the penalty to the originating department for misclassification is approximately 50% of the contract amount. For more information see the District Purchasing Guide. If you have any questions or require assistance, please contact the Director, Accounting Services at the District Office.

- | | Y | N |
|--|--------------------------|-------------------------------------|
| 1. Has this person ever been employed by the District? If so, please explain when and in what capacity _____. | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 2. Does the work include teaching, training, facilitating, counseling, curriculum development, workshops, seminars, or any other function related to education? If so, please explain _____. | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 3. Will the District exercise any control, direction or supervision of the contractor? If so, please explain _____. | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

If the answer to any of the above questions is "Yes" this person should be classified as an employee. If you believe that independent contractor status can still be justified, please attach a statement explaining why, and continue to question #4. If the answer to all of the above questions is "No", continue to question #4.

- | | | |
|---|--------------------------|-------------------------------------|
| 4. Must this individual perform the services (as opposed to the individual subcontracting or assigning the work to others)? Please explain to what extent the individual may or may not hire/subcontract others to do the work _____. | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 5. Has this individual worked for the District as an independent contractor in the past? If so, please explain the nature of past services (for what period, continuous vs. intermittent, how many hours, etc.) _____. | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 6. Can the contractor quit for any reason other than the District's breach of contract? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 7. Can the District terminate the contract for any reason other than the contractor's breach of contract? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

If the answer to three or more of these questions 4 through 7 are "Yes" this person should be classified as an employee. If you believe that independent contractor status can still be justified, please attach a statement explaining why and continue to question #8.

- | | | |
|--|--------------------------|--------------------------|
| 8. Does the individual operate an independent trade or business, offering these same services to the general public? If so, please ask the individual what proportion of their annual revenues are obtained from the District:
Less than 25%- _____ Between 25% & 50% _____ Over 50 % _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Does this individual have a substantial investment in his/her business, maintain facilities, own/rent equipment, etc.? | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Does the individual provide all materials, supplies, and support services necessary for performance of this service? If no, please explain _____. | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Does the individual bear the cost of any travel and business expenses incurred to perform this service (no District reimbursement)? | <input type="checkbox"/> | <input type="checkbox"/> |

If the answer to questions 8 through 11 is "Yes", and the answer to questions 1 through 7 is "No", this individual can be classified as an independent contractor.

The above information has been compiled and reviewed per District Guidelines:

Originator: Kathleen Kuebler, VPA Date: 3/26/14

LOS RIOS COMMUNITY COLLEGE DISTRICT
Service Agreement Certification Form

Requisition No _____
Description of Services _____
Special Project Consultant
Institutional Research
Operations

As of January 1, 2003, Education Code Section 88003.1 restricts the District's ability to contract for services. Before a requisition can be processed, the following certificate must be completed indicating that the required service meets the Ed Code criteria.

Section I

The requisition will not go forward for processing unless you answer yes to at least one of the questions below:

- | | Yes | No |
|--|-------------------------------------|--------------------------|
| 1. Is this a continuing Service Agreement that was in place before January 1, 2003? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. The Legislature has specifically mandated or authorized the service to be contracted out. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. The necessary services are either unavailable within the District workforce, cannot be satisfactorily performed by employees, or are very highly specialized. | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 4. The services are incidental to a contract for the purchase of real or personal property, for example a service contract for office equipment. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Contracting out is necessary to avoid a conflict of interest or other legal problem, or where an outside perspective is needed. | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. The service is needed to respond to an emergency. The contract shall be no longer than sixty days. | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. The contractor will provide equipment, materials, facilities or support services that could not feasibly be provided by District staff. | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. The services are so urgent, temporary or occasional that the delay in the District's hiring process would frustrate the purpose. | <input type="checkbox"/> | <input type="checkbox"/> |

Section II

If the services do not fall within one of the above exceptions, the requisition will not go forward unless you answer yes to all of the following questions:

- | | | |
|--|--------------------------|--------------------------|
| 1. There clearly will be actual overall cost savings. | <input type="checkbox"/> | <input type="checkbox"/> |
| a. The District must consider the salaries and benefits of additional staff and the cost of additional space, equipment and materials. | <input type="checkbox"/> | <input type="checkbox"/> |
| b. The District shall not include the District's indirect overhead costs, unless those costs would be exclusively caused by the work. | <input type="checkbox"/> | <input type="checkbox"/> |
| c. The District shall include the District's costs of supervising, inspecting or monitoring the contractor. | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. The services are not being contracted out solely to save money. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. The contract does not cause the displacement of District employees. | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. The savings must be large enough that market fluctuations will not tip the balance. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. The amount of savings must clearly justify the size and duration of the contract. | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. The contract must be publicly bid. | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. The contract includes specific qualifications of the staff that will perform the work and includes nondiscrimination provisions. | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. There is minimal risk of contractor rate increases. | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. The contract is with a firm. | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. The potential economic advantage of contracting out is not outweighed by the public interest in having the work done in-house. | <input type="checkbox"/> | <input type="checkbox"/> |

If the services do not qualify under Section I or II, then the services must be completed by District staff and the requisition cannot be processed.

Certified by: Kathleen Kuebler
(Dean or other Authorized Signature)

Date: 3/26/14

Kirklin, Kathleen

From: Walden, Tania
Sent: Monday, March 24, 2014 10:00 AM
To: Kirklin, Kathleen; Alford, Jennifer
Subject: RE: Analysis of Institutional Research Operations

I confirm the lower insurance amounts are accepted for this contract.

Tania Walden
Interim Director, General Services
Los Rios Community College District
1919 Spanos Court
Sacramento, CA 95825
Voice: 916-568-3057
waldent@losrios.edu

From: Kirklin, Kathleen
Sent: Monday, March 24, 2014 9:21 AM
To: Alford, Jennifer
Cc: Walden, Tania
Subject: RE: Analysis of Institutional Research Operations

Thanks for responding Jennifer. Tania did approve a waiver of the standard insurance limits for this consultant. Tania was going to send me a confirming email but I haven't received it as yet.



Kathleen Kirklin | Vice President, Administration
Folsom Lake College | 10 College Parkway | Folsom, CA 95630
p. 916.608.6733 | f. 916.608.6584 | Kathleen.kirklin@flc.losrios.edu

From: Alford, Jennifer
Sent: Monday, March 24, 2014 8:18 AM
To: Kirklin, Kathleen
Subject: RE: Analysis of Institutional Research Operations

Hi Kathleen,

Please disregard this email, I see Risk Management reviewed in more depth. Thank you.

From: Kirklin, Kathleen
Sent: Thursday, March 20, 2014 7:42 AM
To: Alford, Jennifer
Subject: Fwd: Analysis of Institutional Research Operations

Jennifer,

This consultant will be on campus to meet with various people regarding our institutional tea search needs. He will do the majority of his work from his office in southern Cal and by phone/teleconference.

Is his insurance coverage adequate?

SGB-NIA INSURANCE BROKERS/PHS
PO BOX 33015
SAN ANTONIO TX 78265

Los Rios District
Attn: Kathleen Kirklin
1919 SPANOS CT
SACRAMENTO CA 95825

Kathleen Kirklin
Sent from my iPhone

Begin forwarded message:

From: "Matthew C. Lee" <matthew@mcleeconsulting.com>
Date: March 19, 2014 at 10:41:07 PM PDT
To: "Kirklin, Kathleen" <KirkliK@flc.losrios.edu>
Cc: "Rosenthal, Rachel" <Rachel.Rosenthal@flc.losrios.edu>
Subject: **RE: Analysis of Institutional Research Operations**

Kathleen,

I have downloaded your vendor packet, thank you, and have filled out the vendor application. I have also downloaded from IRS and completed a W-9 for my TID.

However, before submitting these documents, I have a question about your insurance requirements. I carry a General Liability policy as follows:

- \$1M each occurrence
- \$1M damage to rented premises
- \$10k medical expenses, any one person
- \$1M personal and adv injury
- \$2M general aggregate
- \$2M products-comp/op aggregate
- \$1M combined single limit auto liability, each accident

I also carry a separate \$1M/\$1M per claim/aggregate professional liability (E&O) policy.

It is unclear to me whether my coverage meets your requirement for a \$3M "aggregate limit of liability for products and completed operations," even though you say that "any combination of General Liability and Excess Coverage can be combined to meet the Aggregate." It is also unclear to me whether my coverage meets your requirement of eight separate coverages as spelled out in the applicable paragraph of your "Insurance Requirement for Performing On-Site Services" document. Please advise.

Thank you again.

Matthew

Matthew C. Lee, Ph.D.
Special Projects Consultant for Higher Education
V: 626-797-3372
F: 626-794-6344
www.mcleeconsulting.com

----- Original Message -----

Subject: Analysis of Institutional Research Operations
From: "Kirklin, Kathleen" <KirkliK@flc.losrios.edu>
Date: Mon, March 17, 2014 6:36 pm
To: "Matthew C. Lee PhD (matthew@mcleeconsulting.com)" <matthew@mcleeconsulting.com>
Cc: "Rosenthal, Rachel" <Rachel.Rosenthal@flc.losrios.edu>

Dr. Lee,

As an initial step to issuing a purchase order for your consultant services, please complete LRCCD's vendor packet. Below is the link.

<http://www.losrios.edu/lrc/purchasing/VENDORFORM.pdf>

Please complete and return the Vendor Application to me. Once received, we will prepare a Service Agreement for your review and signature.

Thank you.

Kathleen Kirklin

Vice President, Administration

Folsom Lake College

10 College Parkway

Folsom, CA 95630

P 916.608.6555

F 916.608.6584

kathleen.kirklin@flc.losrios.edu

LEE CONSULTING
3098 N Mount Curve Ave
Alhambra, CA 91001-1750
626-797-3372
www.mcleecconsulting.com

FAX

To: Kathleen Kirkin	From: Matthew C. Lee
Fax: 916.608.6584	Pages: 3
Phone: 916.608.6733	Date: 4/1/14
Re: Service agreement	cc:

Comments:

Post-It® Fax Note	7671	Date	3/21/14	# of pages	3
To	KATHLEEN KIRKLIN	From	MATTHEW C. LEE		
Co./Dept.	ADMINISTRATION	Co.	LEE CONSULTING		
Phone #		Phone #	626-797-3322		
Fax #	916-608-6584	Fax #	626-794-6344		