



Limited Speaker Agreement (LSA) Instructions

IMPORTANT NOTE: Do not click on the link until you are prepared to complete the form. A cost is associated each time the document is opened in Docusign.

Purpose of Agreement

The LSA is used exclusively for payments on one-time nonrecurring guest speaking engagements to guest speakers who are not otherwise employed by or enrolled at Saint Mary's College of California. It can be used in lieu of the Contract Agreement and Routing (CAR) form and the approval process the CAR requires, if all limited speaker engagement criteria are met. Please read the General Instructions carefully before deciding to use this agreement.

General Instructions (see step by step instructions below)

We have simplified the documentation requirements and payment process for guest speakers who meet the limited speaker engagement criteria. Because of this simplification, only a Dean or Department Head with approval authority for the department can approve the agreement.

A limited speaker engagement is a service provided by an independent contractor that qualifies for an exception to the regular independent Contract and Agreement Routing (CAR) process. A limited engagement service is defined as being provided by an independent contractor who performs a service for a fee of \$500 or less. In certain circumstances, we may make an exception for an additional service engagement. However, we ask that you refrain from multiple engagements. This may have additional tax and or classification implications. The following forms are waived for qualifying limited engagements:

- Contract and Agreement Routing form
- Independent Contractor Determination worksheet
- Independent Contractor Agreement form
- Certificate of Liability Insurance form.

Limited engagement criteria:

The following criteria must be met to use the Limited Speaker Agreement.

- Payment must be \$500 or less (excluding any reimbursable expenses)
- Contractor must be a U.S. citizen
- Only for on-campus or virtual event/engagement

Examples of limited speaker engagements:

- Academic guest speakers or special lecturers
- Distinguished guest speakers at on-campus or virtual college functions
- On-campus seminar or workshop leaders where physical contact is not required.

The following criteria *May Not* be used with the Limited Speaker Agreement:

- Any independent contractor engagement that does not meet the limited engagement criteria above
- Payments made with gift cards (may not be used as any form of payment for services. See Gift, Prizes and Awards Policy)
- Contractors whose place of residence is outside the U.S.
- Current faculty, staff and student



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Step-by-Step Instructions for Completing the LSA Form

Please be sure to have the following contractor information available prior to starting:

1. Contractor full name
 2. Contractor email address
 3. Contractor address (optional)
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1. Requestor of contracting department determines if event meets LSA criteria based on the criteria spelled out in the Limited Engagement Criteria above. If event meets the criteria, continue to step 2. If not, do not continue or click on the LSA link. A CAR form must be completed.
 2. Requestor clicks on the LSA link below and enters the required name and email address for the Requestor, Department Head and Speaker and then clicks Begin Signing at the bottom. Click Next on the next page.
 3. Requestor checks the "I agree to use electronic records and signatures" at the top of the page and clicks continue. Requestor completes the Speaker Information and Event Information and clicks on the Finish button.
 4. Dean or Department Head of contracting department will receive an email from Docusign and clicks on the envelope to launch Docusign. Once in Docusign, click Continue. Click on the Sign button. At this point you can choose to Adopt the provided signature or initials, or you can elect to Draw your signature. (Drawing signature is used more for mobile devices). Click on the Finish button. Choose No Thanks to continue.
 5. Email is sent to contractor to open envelope and sign document.
 6. Once contractor signs, requestor will receive an email from Docusign informing him/her that the LSA is complete.
 7. Contracting department completes a check request including a brief description of the speaking event, and attaches the LSA and W-9 to the check request
 8. Check request, LSA and W-9 are emailed to accounts.payable@stmarys-ca.edu for processing

Please contact Gary Stewart gbs2@stmarys-ca.edu if you have any questions or need assistance.

Due to remote working and learning, speakers are no longer required to be on campus to qualify for the LSA.

[Click Here to Access LSA](#)