



INDEPENDENT CONTRACT ("IC") QUESTIONNAIRE

Answer ALL questions on this page BEFORE completing the attached IC Agreement.

HUMAN RESOURCES

Is the individual who is providing services a current WMU student, faculty or staff member? YES NO

Is the individual a current/former WMU employee (continuing, temp, term, part-time, student) who will be providing services *similar* to their WMU duties within the last two years? YES NO

- **IF YES to either question, STOP. Do NOT continue with this form.** These people are considered "WMU employees" (for tax purposes) and NOT independent contractors. Contact Human Resources for further instruction regarding paying these individuals for services rendered. **IF NO, continue.**

SCOPE OF WORK

Does the work include a trade skill found in Facilities Management (carpentry, plumbing, painting, electrical, landscaping, custodial, etc.)? YES NO

• If you answered YES to the first question, will the work be performed on campus? YES NO

- **IF YES, for both questions, STOP. Do NOT continue with this form.** Engage Facilities Management employees for the work per union contract. **IF NO, continue.**
- **IF YES for the first question and NO for the second question, continue.**

TAXATION

Is the individual a foreign national performing tasks or providing services for WMU? YES NO

Is the individual providing personal services for WMU for which no payment is required/requested? YES NO

- **IF YES to the first question, STOP. Do NOT continue with this form.** See [Foreign National Payments General Info](#) for further instructions and attach evidence of their approval.
- **IF NO, continue.**

FOREIGN PURCHASES

Does this contract or agreement involve: (a) the physical shipment of items from the United States to a foreign country; or (b) the release or presentation of unpublished, restricted, or controlled information regarding technology, research, or data to any foreign person(s) or entity within or outside the United States by way of visual inspection, oral transmission, conference presentation, or training? YES NO

- **IF YES, STOP. Do NOT continue with this form.** This Agreement will not be approved for purchase until you contact WMU's Research Export Control Officer to ensure compliance with export control law, and attach a copy of their report to this form. See <https://wmich.edu/research/compliance/exportcontrol>
- **IF NO, continue.**

CONFLICT OF INTEREST

CONTRACTOR must act in a manner consistent with its duties to the University and shall ensure that there are no conflicts of interest between its duties to the University and other employment, personal duties, or relationships. CONTRACTOR must disclose any actual or potential Conflict of Interest related to this Agreement prior to signing this Agreement. Failure to do so could void this Agreement. To disclose, see University's Employee Conflict of Interest Policy [here](#).

INDEPENDENT CONTRACTOR AGREEMENT

This Independent Contractor Agreement (the "AGREEMENT") is made and entered into by and between the Board of Trustees of Western Michigan University on behalf of [department name] ("WMU"), with principal offices located at 1903 W. Michigan Ave., Kalamazoo MI, 49008 and _____ ("CONTRACTOR"). For the mutual consideration described herein, the Parties agree as follows:

WMU CONTACT NAME/EMAIL/PHONE/MAIL STOP: _____

RETURN TO (if different than WMU Contact): _____

WMU FUND AND COST CENTER: _____

CONTRACTOR'S OFFICIAL NAME (per W-9): _____

DBA (if different from official name): _____

CONTRACTOR'S ADDRESS/EMAIL/PHONE: _____

SCOPE OF WORK (REQUIRED INFORMATION includes work details, dates, times, where work is to be performed, deliverables, etc. *attach additional sheets, as necessary*):

AMOUNT PAYABLE TO CONTRACTOR (include initial purchase price **and** any ongoing fees: \$ _____)

If amount of purchase is >\$5,000, you must follow WMU bid procedures or attach approved sole source form.

TERM OF AGREEMENT (*must not exceed 12 months*): Effective Date _____ Expiration Date _____

IN WITNESS WHEREOF, the Parties have executed this Agreement on the dates indicated below their respective signatures, and hereby incorporate the attached Independent Contractor Agreement Terms and Conditions .

Signatures should be obtained in the order written below. Routing preferred via email. E-signatures allowed.

CONTRACTOR NAME: _____

Sign: _____

Title: _____

Print: _____

Date: _____

WMU DEAN/CHAIR/DIRECTOR/DEPARTMENT HEAD (WITH BUDGET AUTHORITY):

Sign: _____

Title: _____

Print: _____

Date: _____

WMU GRANTS & CONTRACTS (FUNDS 25-30 [Exhibit B&C](#) as necessary: grants-services@wmich.edu):

Sign: _____

Title: _____

Print: _____

Date: _____

WMU RISK MANAGEMENT (michele.cole@wmich.edu):

Sign: _____

Title: Senior Director, Risk Management

Print: Michele Cole

Date: _____

INDEPENDENT CONTRACTOR AGREEMENT TERMS AND CONDITIONS

1. CONTRACTOR warrants and represents that CONTRACTOR is engaged in an independent business, is fully qualified, and has all required, currently effective licenses and/or certifications to perform the services described; has adequate insurance coverages for itself and WMU against liability or any claims that arise from or regarding the services to be performed; and has complied and will continue to comply with all federal, state, and local laws regarding business permits, licenses, taxes, and governmental obligations of any kind that may be required to carry out the business, the tasks to be performed, and the payments received by CONTRACTOR under this contract.
2. If this contract involves any transactions with a federal agency, CONTRACTOR has certified that CONTRACTOR complies with Federal Executive Order 12549 and FAR 521.209-5 and has reviewed and signed [Exhibit B&C](#) (if applicable). See <https://wmich.edu/business-services/forms>.
3. CONTRACTOR responsibilities include setting own hours and/or the sequence of work, and providing and completing training and supervision of its employees. CONTRACTOR will not be trained or supervised by a WMU employee, and will not supervise employees of WMU.
4. WMU will not be liable to CONTRACTOR for any of CONTRACTOR's expenses unless otherwise agreed to in writing (attach Exhibit A if needed).
5. CONTRACTOR retains the right to control the manner by which the services (described above) are to be performed. CONTRACTOR expressly understands and agrees that neither CONTRACTOR, nor any employee or agent of CONTRACTOR, in the performance of CONTRACTOR's services required under this Agreement, shall be treated or otherwise considered to be an employee(s) of WMU for taxes, worker's compensation, unemployment compensation, insurance, fringe benefits, or any other purpose, except as may otherwise be required by law. No payroll, employment, or other taxes of any kind shall be withheld or paid by WMU with respect to payments to CONTRACTOR, unless as otherwise required by law. CONTRACTOR understands and agrees that CONTRACTOR is solely responsible for compliance with all laws regarding the timely reporting and payment of all income and other taxes and other governmental liabilities resulting from the performance of CONTRACTOR's services.
6. Notwithstanding anything contained in this agreement to the contrary, WMU reserves the right to terminate this agreement immediately for any or no reason and prior to the stated end date, including but not limited to termination based on WMU's finding that CONTRACTOR has failed to perform in accordance with the terms of this agreement. In the event CONTRACTOR has performed part of the tasks or services, WMU may, in its sole discretion, pay CONTRACTOR a prorated amount. Any prorated amount may be adjusted if WMU must retain another contractor at a higher cost to perform the services or tasks originally agreed-to by CONTRACTOR or if WMU suffers other damages as a result of CONTRACTOR's failure to perform as described in this Agreement.
7. CONTRACTOR has no authority to enter into any contract(s), promise(s), or agreement(s) on behalf of WMU. This agreement, in whole or in part, may not be assigned by CONTRACTOR.
8. This Agreement shall be governed by and construed pursuant to the laws of the State of Michigan.
9. To the fullest extent permitted by law, CONTRACTOR shall be liable for, indemnify, and hold harmless WMU, its Board, president, officers, and employees from and against any or all claims, demands, actions, and liability arising out of, resulting from, or attributable to CONTRACTOR's, CONTRACTOR's employees', agents' or subcontractors' performance or nonperformance of any services or work covered by this Agreement, and/or for any breach or warranty.
10. This Agreement constitutes the sole and entire agreement of the Parties with respect to the subject matter herein, and supersedes all prior and contemporaneous understandings and agreements, written and oral, regarding this subject matter.
11. CONTRACTOR certifies that CONTRACTOR is at least 18 years of age or a separate legal entity in good standing.
12. CONTRACTOR agrees to follow all relevant University policies or procedures while on campus or while performing work for WMU.
13. CONTRACTOR certifies that none of its employees, contractors, paid advisors, or relatives of any of the above is a WMU employee at any time during the term of this agreement. If CONTRACTOR is unable to so certify, it must explicitly disclose any existing conflict of interest to WMU Risk Management immediately. In such situations, Risk Management will provide an opinion, in writing, explaining whether CONTRACTOR may proceed with this Agreement. Such writing must be attached hereto.
14. The Parties intend all materials, inventions, ideas, designs, software, writings, works of authorship, and any other work product created by CONTRACTOR in the course of performing the Services (collectively, the "Work Product") to be considered "works made for hire" under applicable laws, with all intellectual property rights in the Work Product owned by and belonging to WMU. To the extent that any of the Work Product is not deemed a "work made for hire" under law, CONTRACTOR hereby irrevocably sells, assigns, and transfers to WMU all right, title and interest in the Work Product, including all other intellectual property that has or may be developed by CONTRACTOR in connection with this Agreement, including all patents, trademarks, trade secrets, technical data, information, inventions, ideas, discoveries, improvements, creative works, derivative works, know-how, work product, industrial property and all other forms of intellectual property, whether or not patentable, to WMU..