CENTER FOR TRAINING AND DEVELOPMENT

Subject Matter Expert Guidelines

CTD Contact Information

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Purpose of The Subject Matter Expert Guidelines Manual

This handbook has been created as a resource for you. It outlines the interactions and expectations between the Center for Training and Development (CTD) and the Subject Matter Expert (SME), from our initial interview to how you are paid. It also covers the special services that are available to you as an SME of CTD.

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Welcome to Team CTD

As a Subject Matter Expert for the Center for Training and Development, you are a member of a team dedicated to the best quality and service that can be provided. It is ***your*** expertise that allows us to deliver the highest value training and services to our clients.

Who we are

The Center for Training and Development (CTD) was established as the economic development and contract services division for the College of the Desert in 1985. CTD is responsible for delivering all of our not-for-credit, fee-based workshops, seminars and programs, as well as our customized, onsite contracted training and consulting services for business and industry. We deliver a wide variety of workforce development solutions through our two primary channels of distribution:

CTD CommunityConnect – our public workshops, seminars and programs either instructor-led or online

CTD BusinessConnect and CTD PublicAgency Connect – our custom training and consulting services typically delivered onsite at the business or agency location

We operate primarily in the Coachella Valley (Palm Springs; Cathedral City; Rancho Mirage; Palm Desert; Indian Wells; La Quinta; Indio).

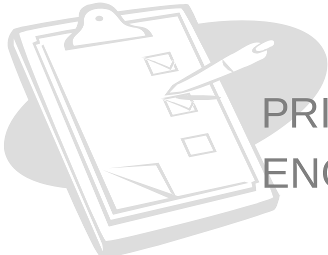
What we do

We create and deliver customized workforce development solutions and performance improvement programs for our clients as well as a wide variety of training solutions offered through CTD CommunityConnect. See our website for a sample of the training and consulting services we provide: www.codtrainingcenter.com.

How we do it

We contract with you, our Subject Matter Experts (SME). You come from business, industry, consulting firms, colleges and anywhere else the expertise required resides. Together, we generate a solution to meet the needs of our clients.

As a self-funded entity, charged with generating income to cover our costs, the center generates most of its revenue from our public workshops and other fee-based programs or contracts for services directly paid for by the employer.



PRIOR TO SERVICE DELIVERY OR CONSULTING ENGAGEMENT

Step 1: Submit Initial Paperwork

You will need to submit a current resume, copies of any degrees or certifications held, and a statement of subject matter expertise.

Step 2: Initial Interview with the Center for Training and Development

You will be interviewed by either the CTD Director or the Program Director. At that time, you will be provided with an SME Memorandum of Understanding. The agreement must be signed and returned to CTD before you can be contracted for any engagement.

Step 2A: Determining Hiring Classification

Temporary Employee

If you have ever been an employee of the College of the Desert, or you are not able to claim status as an Independent Contractor (see Appendix A ***– Independent Contractor or Employee*** for details) you will be processed as an employee of the Desert Community College District.

Independent Contractor

If you have never been an employee of COD and are self-employed, you may qualify as an Independent Contractor (see Appendix A ***– Independent Contractor or Employee*** for details). If your business is incorporated you would also fall under this category.

Step 3: Availability/Interest/Qualifications

When a service delivery opportunity arises, a Program Director or Training Assistant will contact you. Our initial call will be to establish your interest and availability and/or to clarify your qualifications. This is not a verbal commitment to you to contract for your services.

Step 4: For Services Provided Directly to Client Only

Meeting with the Client (aka, the Interview)

As with any job interview, you will not be reimbursed for meeting with the client.

Interview procedures:

1. The Program Director will discuss the client's initial needs and provide you with information necessary to prepare for the interview.

2. The Training Assistant will contact you to schedule the interview with the client.

3. Please be sure to show up to the client's office 10-15 minutes early. Make sure to give yourself enough travel time in case you have trouble finding the location.

4. Please do not give the client your contact information or contact the client directly after the initial meeting. We will act as the facilitator for the client's needs, and we will make sure to keep you well informed as the SME selection process progresses.

5. Please bring some sample materials for the client and come prepared to discuss the solution being considered. In most cases, you will be provided an outline with the major topics for discussion. Remember, information gathered during this interview will be used to customize the solution to fit the client's needs.

6. **Do not** discuss compensation or financial details with the client.

7. Contact your Training Assistant or Program Director after the interview.

Step 5: SME is selected

If you are selected, the Training Assistant or Program Director will contact you. You may request course materials or any equipment needs at this time. Please complete the "Request for Services" form provided by your Training Assistant to make your request for course materials and equipment.

For client specific delivery, ***do not*** call the client directly.

Step 6: Paperwork to hire you

If you are new to CTD, you will be asked for your Social Security Number or Federal Tax ID Number.

Temporary Employee
The Program Director or Training Assistant will gather the information required for a Temporary Employment Agreement to be completed. You will receive a completed agreement via email (our preference for expeditious processing). Once received, please print out one (1) document **IN COLOR** if possible, sign and date where indicated **IN BLUE INK**, and return your signed contract ***in person within two (2) days*** to the CTD Secretary at the College of the Desert, Central Annex, Room 6, 43-500 Monterey Avenue, Palm Desert, CA.

- When you come in, we will provide you with timesheets OR invoices (depending on the nature of the assignment), as well as a form showing you the dates timesheets/invoices are due and when checks will be issued.

- It is a Human Resources requirement that all new employees, even temporary ones, have fingerprints on file. The CTD Secretary will coordinate your available dates and times with Human Resources so that an appointment can be arranged. It takes 1-5 days for the results to come back so you need to have them taken as soon as possible. **Please note:** you will need to bring your original social security card, not a photocopied one, when you come to the Human Resources office. The Human Resources office is open Monday through Friday, 8:00am to 5:00pm.

- Also, if you have not had a TB test within the last six (6) months, you need to arrange for a test as soon as possible. Your personal physician or an urgent care center can perform the test. You will have to return to your physician or the urgent care center in three (3) days to have the results read at which time you will receive your "pass" documentation. This documentation must be brought into the Human Resources office before your paperwork can be processed, preferably at the same time you have your fingerprints done.

When all Desert Community College District signatures have been obtained, we will send you one (1) fully-executed agreement for your files.

Independent Contractor
We will submit an Agreement for Contracted Services that defines the scope of the services being delivered. The process requires obtaining your signature, and the signatures of the CTD Director and designated COD Administrators. When the Agreement for Contracted Services has been signed by all parties, a copy will be sent to you.

You will be responsible for submitting an invoice and appropriate documentation to your Training Assistant after the service has been delivered. If the service delivery is for an extended period of time, a payment schedule may be arranged (monthly, quarterly, etc.). This payment schedule will be part of your Agreement for Contracted Services.

Step 7: Service delivery is scheduled

The Training Assistant is the main contact. He/She will handle all logistics regarding the delivery of services.

HANDOUTS AND COURSE MATERIALS

Curriculum Development

Hours for curriculum development are negotiated in advance. If you have any questions regarding the number of hours, rate, etc., please contact your designated Program Director. All curriculums developed as a result of an agreement between SME and CTD is the property of CTD and a final copy of the curriculum must be submitted electronically to your Training Assistant before payment.

Equipment

The purchase/rental of materials or equipment must be arranged/negotiated in advance with the Training Assistant or Program Director. Please note we have laptop computers and LCD projectors for use in the classroom. We also have an extensive video library that is available for your use. Check out the available DVDs and videos at http://www.codtrainingcenter.com/videolibrary.html. ***If you purchase or rent materials or equipment without authorization, you will not be reimbursed.***

Course Materials

Please refer to the ***Material Preparation Services*** section in **Appendix B** for material expectations. To provide adequate time to process your materials, deliver/e-mail them to your Training Assistant at CTD **ten (10) working days** before the start date of assignment. *E-mailed files are preferred.* Materials must be in a Microsoft Office format (Word, PowerPoint or Excel). ***If you choose to make copies on your own, you will not be reimbursed.***

Please e-mail or make arrangements with Training Assistant to send a complete set of your course materials to the Training Assistant before the start of assignment. We are required to keep a set of your materials on file.

You are responsible for picking up your materials at the CTD Office. Call your Training Assistant to confirm the date they will be ready. When you pick up your course materials you should have the following:

Basic/Standard

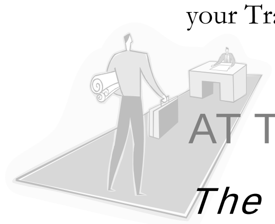
- Class roster (for all CTD CommunityConnect workshops and programs)
- Sign-in sheet(s)
- Participant Intake Form
- Evaluations (allow time at the end of each session)
- Copies of Handouts
- Directions to the site, if needed
- Timesheet or Invoice Template

If you do not receive any of the above, please let your Training Assistant know.

Occasionally, additional materials are requested/required and provided depending on the needs of the client, the contract or the SME.

- Equipment/Multimedia Rental (Video/DVD/Projector, etc., as requested, unless provided at the site)
- Certificates (as requested, please sign and date certificates, then distribute at the end of class)
- Blank Training Summary sheet (please fill in requested information)
- Post-test (as required)

If you do not receive any of the above and think you should have, please check with your Training Assistant.



AT THE SITE or IN THE CLASSROOM

The Basics

Please arrive at the site or the classroom a minimum of 15 minutes before the assignment is to begin. If you are running late, please call your Program Director or Training Assistant. The exception would be if it is before or after normal business hours. Unless you have been provided the Director's or Training Assistant's cell phone number, call the site contact person and then call and leave a message at our office (760-776-7420).

Equipment
If you are using equipment (projectors, VCRs, etc.), please allow extra time for set-up.

Sign-in Sheet
Place the sign-in sheet near the entrance on a table or desk with a couple of pens for the participants to use when they sign-in. Remember to pick it up at the end of session. If your sign-in sheet has an instructor's signature line at the bottom, please sign it.

Participant Intake Forms
Hand out the forms at the beginning of the session. There should be a form for each registered participant. Remember to pick them up at the end of session.

Post Tests
If a post test is required, please remember to have the participant take the test, then review and grade with the participants. This will reinforce their knowledge before they leave since we will not be meeting with them to discuss their test scores. Collect the post tests.

Evaluations
In the last five minutes of the session distribute the evaluations, have the participants fill them out and collect them as the students leave. Evaluations are important because they provide feedback not only for the client but also for CTD and the instructor. When you turn in the evaluations, they are compiled onto a summary sheet. The original evaluations, evaluation summary and the sign-in sheet will be provided to the

client after the service delivery has been completed. Long-term assignments, such as English as a Second Language, may require post assessment of the participant. In this case, a post assessment is provided instead of an evaluation.

Additionally, please be aware that the Program Director or CTD Director may stop by to observe the training.

AFTER THE ASSIGNMENT

The Process

All materials, equipment and requests for payment (timesheet or invoice) must be received by the Training Assistant prior to payment being made to SME.

At the completion of your assignment, return the following:

- **Electronic copy of the final curriculum**
- **Completed Participant Intake Forms, Sign-in sheet(s) and Evaluations**
- **Any other items such as:**
  Equipment/Multimedia Rental (Video/DVD/Projector, etc)
  Training Summary
  Graded Post-Test
  Post-Test Key
  Attendance Record and Grade Roster
- **Request for payment**
  Invoice or Timesheet

Note: Your timesheet or invoice will not be processed until the required documentation has been received. A delay in returning equipment may also delay the processing of your payment request.

Returning Equipment

When you return equipment, it must be presented to a Center for Training and Development staff member. Never leave it in the main lobby or at an empty desk/cubicle. We have had equipment taken from unattended workspaces. If you are returning equipment around lunch hour, please call ahead to verify that a staff person will be there to receive the equipment.

INDEPENDENT CONTRACTOR

Preparing your invoice

The invoice should include the following information:

- Invoice Date
- Invoice Number
- Your Name
- Company Name (if applicable)
- Mailing Address

Invoice Detail *(see below for example)*

- Indicate client name – *for multiple clients, consolidate assignments by client.*
- Date of assignment
- Description of hours – assignment name/topic, type of hours billed, i.e., training or curriculum development *(Hours designated as other than training must be approved in advance by the Director.)*
- # of hours by type and date
- Hourly rate or rate per session - provide # of students, if your rate varies depending on class size

Example of invoice detail for a single client

12/3/04	Team Building	curr dev	2 hrs @ $45.00/hr	$90.00
12/7/04	Team Building	training	4 hrs @ $50.00/hr	$200.00
Invoice Total				**$290.00**

Mail or hand-deliver your invoice with the corresponding materials (if you have not already sent them in) to the address listed below:

Your Training Assistant's Name
Center for Training and Development
College of the Desert
43-500 Monterey Ave.
Palm Desert, CA 92260

TEMPORARY EMPLOYEE

Temporary Employees may be asked to complete either a timesheet or submit an invoice depending on the work being completed. A timesheet will be submitted all work done except for work done with the CTD CommunityConnect program whereby the SME has agreed to a 60% - 40% split.

Preparing your timesheet

As a Temporary Employee, you are considered an employee of the District. Therefore, you are paid once a month.

For SMEs who are also COD Adjunct Faculty members, your timesheets are due no later than the 17th of the month but every effort should be made to submit by the 15th. It is acceptable to submit anticipated work time for the 16th & 17th. Your pay date is no later than the 6th of the following month. If you submit your timesheet late, your check could be delayed by a minimum of two months.

For SMEs who are NOT members of the COD Adjunct Faculty, your timesheets are due no later than the 5th of the month but every effort should be made to submit by the 1st. It is acceptable to submit anticipated work time for the 2nd – 5th. Your pay date is no later than the 23rd of that same month. If you submit your timesheet late, your check could be delayed by a minimum of two months.

Fill out the following sections of the time sheet:

- **NAME** – Last, First, Middle
- **POSITION** – Trainer, Facilitator (not needed for Adjunct Faculty Members)
- **PAY/HR or RATE OF PAY** – per your contract
- **PAY PERIOD** – see payroll schedule
- **DEPARTMENT & SUPERVISOR** – CTD (department) & Leslie Larrabee (Supervisor)
- **TIME WORKED & TOTAL** – use column labeled "Regular." Under "Remarks" indicate type of hours if other than training, i.e., consultation or curriculum development. *(Hours designated other than training must be approved in advance by the Director.)*
- **SIGNATURE OF EMPLOYEE –** sign form

Mail or hand-deliver your timesheet with the corresponding materials (if you have not already sent them in) to the address listed below:

Your Training Assistant's Name
Center for Training and Development
College of the Desert
43-500 Monterey Ave.
Palm Desert, CA 92260

Preparing your invoice

For work done with the CTD CommunityConnect program whereby the SME has agreed to a 60% - 40% split, an Invoice for Temporary Employment Services form will be provided to you when you pick up or receive your course materials.

When you pick up this form with your course materials, your Training Assistant will ask you to fill in the Contract Number and your name and address. The Training Assistant will have already completed the Division/Department line for you.

When you return your course materials, you and your Training Assistant will complete the balance of the form including your signature.

The Training Assistant will submit your invoice for processing.

APPENDIX A

INDEPENDENT CONTRACTOR OR EMPLOYEE

Which are you?

For federal tax purposes, this is an important distinction. Worker classification affects how you pay your federal income tax, social security and Medicare taxes, and how you file your tax return. Classification affects your eligibility for employer and social security and Medicare benefits and your tax responsibilities. If you aren't sure of your work status, you should find out ***now****. This brochure can help you.*

The courts have considered many facts in deciding whether a worker is an **independent contractor** or an **employee**. These relevant facts fall into three main categories: *behavioral control; financial control;* and *relationship of the parties*. In each case, it is very important to consider all the facts – no single fact provides the answer. Carefully review the following definitions.

BEHAVIORAL CONTROL

These facts show whether there is a right to direct or control how the worker does the work. A worker is an employee when the business has the right to direct and control the worker. The business does not have to actually direct or control the way the work is done – as long as the employer has the right to direct and control the work. For example:

- **Instructions –** if you receive extensive instructions on how work is to be done, this suggests that you are an employee. Instructions can cover a wide range of topics, for example:
  - how, when, or where to do the work
  - what tools or equipment to use
  - what assistants to hire to help with the work
  - where to purchase supplies and services

If you receive less extensive instructions about what should be done, but not how it should be done, you may be an **independent contractor**. For instance, instructions about time and place may be less important than directions on how the work is performed

Training – if the business provides you with training about required procedures and methods, this indicates that the business wants the work done in a certain way, and this suggests that you may be an **employee**.

FINANCIAL CONTROL

These facts show whether there is a right to direct or control the business part of the work. For example:

- **Significant Investment –** if you have a significant investment in your work, you may be an independent contractor. While there is no precise dollar test, the investment must have substance. However, a significant investment is not necessary to be an independent contractor.

- **Expenses** – if you are not reimbursed for some or all business expenses, then you may be an independent contractor, especially if your un-reimbursed business expenses are high.

- **Opportunity for Profit or Loss** – if you can realize a profit or incur a loss, this suggests that you are in business for yourself and that you may be an independent contractor.

RELATIONSHIP OF THE PARTIES

These are facts that illustrate how the business and the worker perceive their relationship. For example:

- **Employee Benefits –** if you receive benefits, such as insurance, pension, or paid leave, this is an indication that you may be an **employee**. If you do not receive benefits, however, you could be either an **employee** or an **independent contractor**.

- **Written Contracts –** a written contract may show what both you and the business intend. This may be very significant if it is difficult, if not impossible, to determine status based on other facts.

When You Are an *Employee*

- Your employer must withhold income tax and your portion of social security and Medicare taxes. Also, your employer is responsible for paying social security, Medicare, and unemployment (FUTA) taxes on your wages. Your employer must give you a Form W-2, *Wage and Tax Statement*, showing the amount of taxes withheld from your pay.

- You may deduct un-reimbursed employee business expenses on Schedule A of your income tax return, but only if you itemize deductions, and they total more than two percent of your adjusted gross income.

When You Are an *Independent Contractor*

- The business may be required to give you Form 1099-MISC, *Miscellaneous Income*, to report what it has paid to you.

- You are responsible for paying your own income tax and self-employment tax (Self-Employment Contributions Act – SECA). The business does not withhold taxes from your pay. You may need to make estimated tax payments during the year to cover your tax liabilities.

- You may deduct business expenses on Schedule C of your income tax return.

Reproduced from IRS Brochure
"Independent Contractor or Employee"
www.irs.gov
*Publication **1779** (Rev. 1-2005)*
Catalog Number 16134L

APPENDIX B

MATERIAL PREPARATION SERVICES

The Center for Training and Development offers word processing, design, duplication and assembling services for our subject matter experts as it relates to our contracted assignment.

Basic Services (No Fee)	Additional Services (Fee)
• Duplicating	• Word Processing
• Assembling	• Design and Layout

Expected Level of Quality for Service Delivery Materials

1. Course materials should be first generation copies
2. Pages should be clean (no scuffs, erasure marks, corrections, dirt, etc.)
3. No handwritten page numbers
4. Free from typographic and spelling errors
5. No more than three different fonts used
6. Minimum font size for body text is 10
7. One inch margin minimum on left-hand side of page

Unless it is indicated otherwise, our standard copying for handouts is white paper, double-sided, collated, and stapled. If the client requests that the materials be placed in a binder, we will hole-punch instead of staple. The Center for Training and Development will provide a cover sheet. Please indicate any preferences you may have regarding the color of paper, stapled, etc.

Formatting Materials
E-mailed files are preferred. If you send your materials by e-mail, they must be in a Microsoft Office format (Word, PowerPoint or Excel) and sent as an attachment.

PowerPoint
If you are using a PowerPoint presentation, please indicate the number of slides you would like to have on each page of the handout and the format.

Deadline for Materials
To provide adequate time to process your materials, deliver or e-mail them to CTD **ten (10) working days** before the start date of assignment.

Materials Pick up
When your materials are ready, we will contact you for pick up.

Reimbursement of Cost for Duplication
You will **not** be reimbursed if you choose to make copies on your own.

Materials Upgrade (fee based)
If you would like to have your materials upgraded or digitized, please contact us.

SME Guidelines Manual provided by the Center for Training and Development

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