Transcript Consulting Contract Cover Card walkthrough:

We're going to fill in the Consulting Contract Cover Card so the first thing you are going to do is open the card and go to the first page where you just fill in your details so we've already started this here. You can see that we've got John Smith. Here is John's Staff ID number. You can find yours on your Staff ID card. John happens to be a member of the College of SHE and he's from the School of Life Sciences. If he wasn't from a College or School, he could be from an Institute, a Centre or an Administrative Division. In those cases, he'd leave the College and School blank and he'd just write the name of his group under 'Other'. Uh...the project title is 'Pesticide Review'. Now, that's just a description that helps John understand what this document is associated with, what project or...or contract. And for anyone reading the card, it will help them to distinguish what project we're talking about as well. John happens to be the project leader. If he wasn't, then he'd put down the name of the actual project leader but he's got to bear in mind that all of the answers on this card and his signature and declaration at the end are his. So he's the one who needs to be accountable for the accuracy to the questions and how they've been answered. For that reason, it's a really good idea for the project leader to fill in the card rather than somebody else. The client, in this case, is Pesticides Limited and the value of the contract is ten thousand dollars. We now are presented with ten questions. The first one's really easy because it's about the value and so it's saying that as long as it's below fifty thousand dollars we're ok and we are, it's only ten thousand dollars. If it's above fifty thousand dollars, then Legal Services need to look at it because they're going to draft you a bespoke contract for you. Question two is about rates and so as long as you've used the Consulting Budget Calculator, and you haven't reduced those rates, you can tick yes and that is true in John's case. There are certain exceptions..uh...but that is really an exceptional situation when you may have to, for some reason, reduce the base rates and you can talk to La Trobe Consulting about that or to your Head of School or Division. Question three is about other stuff - room hire, travel, equipment, all of that sort of thing. In John's case, he's hired a car and a hotel for the night..uh..before he delivers that work and he's included that in the calculator. You'll notice in the budget calculator that in the bottom part of that form..uh..it refers to these sorts of items so you can include them. Question four is about intellectual property. So there may be a situation where a pesticide company, for example, has paid for John to do some research and the resulting knowledge of that research it may be owned by that company. Now if John's going to start using those results and giving people advice, particularly competitive pesticide companies then the company who funded that research may not be happy with that. If you're not sure, you can contact Innovation and Commercial Development. Otherwise you can go ahead and tick yes and move forwards. Question five is to do with compliance. Now this is particularly important if you're giving medical advice or financial or legal advice. In those examples, you would need to be a member of certain associations just to have accreditation in order to give those types of advice. So in John's case, he's ok..uh..he has the right skills for the job and he's comfortable that he can do it and certainly his Head of School will look at this and uh and make that call as well to say yes I think that's right John, I think you can go ahead and do this work. Question six is a question of ethics. If you're not collecting data and that's true in John's case, you can just tick yes. If you're starting to enter into collecting data, particularly around humans and animals and genetically modified organisms, then you're probably doing research not consulting and, in that case, you have to deal with a different process and it's worth talking to Research Services if you're not sure whether or not what you're doing is research or whether it's consulting. The main difference being research is something that's, you're creating new knowledge and you're probably going to lead to a paper. Consulting is when you're sharing existing knowledge. Question seven is about staff. Now the reason we ask this question is because if you are staff then you will have insurance and you'll be covered by insurance. Non staff members delivering consulting work won't be covered. An example would be an HDR student helping you with the project and so they're not covered but you can in this case, uh..tick yes, when you've made them a casual or you have committed to making them either a casual or some other arrangement that might be approved by legal services. that arrangement allows us to offer insurance to those HDR students or anyone else who's not a staff member. Now question eight, in John's case, he's going to do this work in a very remote part of Australia so he's spoken to Health and Safety and they're really concerned that he doesn't know a lot about remote Australia so they're not sure they really want to take the risk and recommend that he does that work so we're going to tick no there. If you're not sure what remote or Government travel alert or high risk means then you can go on to the Occupational Health and Safety page on the La Trobe Consulting intranet and that will give you our definitions of what those things might mean. Question nine: have you used La Trobe's Short Form Consulting template? And that's for anything under fifty thousand dollars. In this case he has and the important thing here is about the terms and conditions. If they are changed, you need to speak to legal services and if they're not changed then you're good to go. Question ten is about policies. Now really we're concerned with consultancy and Outside Work type policies. Examples here would be conflicts of interest. Now in this case, no we're ok and John is not compromising his substantive role as a lecturer so that's good. Now we could just move on to our declaration except that we did put no to question eight and anywhere where you tick no, you do need to fill out this last section. And really what this is is an escalation to the DVC(R) who yes, can say, we understand that you are going to a remote location however, even though Health and Safety are not comfortable with it, as a University we ARE and we support this important work that you're doing. So it is an escalation button really and it stops Health and Safety feeling that they have to take on this risk. They can say - look we don't really support it - and there's the situation. What you can do is go to the DVC(R) to complete that. The last thing you're going to do is sign and date the card. You have two options at this point. One is to print the card out and sign it. The second is to sign it digitally. So we're going to sign this digitally. You'll see that John's already got a signature. Now bear in mind that we're going to lock this document after signing which means that John will not be able to edit this card so it's important to go back and check that you've written in everything that you want to and that you've answered all of these questions correctly. When you're happy with that; that's the time to sign. So the first thing it will do is ask for your password and important to lock document after signing. The reason for that is that we don't want anybody editing this document otherwise it will look as though John has signed a document that but somebody had the opportunity to change it. So it's really important, for John's sake, and everybody else’s, that we lock it and we don't allow editing - and then we hit sign. What will happen is it will produce a pdf file. Now we're going to store that on our desktop and I'm going to call it something a bit more memorable. You'll see that the signature has now been dropped in and everything is frozen so it's not possible for me to edit this document. If I close it, you can see that that document is now available for me here to email to anybody that I like and it's on my desktop ready for use. Happy consulting! Good luck.