

B
 BROKEN ARROW PUBLIC SCHOOLS
Educating Today Leading Tomorrow

Contract Committee Review Request
 MUST BE COMPLETED IN FULL

Date: April 7, 2022

Contract/Agreement Vendor: Learning for Living, Inc / Laurie
Name of Vendor & Contact Person

laurie@learningforliving.com
Vendor Email Address

Facilitator for BAHS Fall Leadership Retreat
Describe Contract (Technology, program, consultant-prof Development, etc.)

Please use Summary below to fully explain the contract purchase , any titles, and details for the Board of Education to review.

New Agreement / BAHS
Reason/Audience to benefit

May 9, 2022 \$ 6,500.00
BOE Date Amount of agreement

Person Submitting Contract/Agreement for Review: Carolyn Harger

PLEASE SEND THROUGH APPROPRIATE APPROVAL ROUTING BEFORE SENDING TO BOARD CLERK

Principal &/or Director or Administrator: *Christina Welborn*

Does this Contract/Agreement utilize technology? YES/ NO
 If yes, Technology Admin: _____

Leadership Team Member: *John L. Owen*

Funding Source: 11 / 005 337 / Deposit to be paid w/ Activity Funds, Proj. 934
Fund/Project OCAS Coding \$3500 \$3000

Consent

Action

Learning for Living, Inc. will provide facilitator Dean Whellams for BAHS Fall Leadership Retreat at New Life Ranch, Oct. 29-30, 2022.

Summary *This area must be complete with full explanation of contract*

The Contract/Agreement should be received at least 2 weeks prior to a Board Meeting to ensure placement on the Agenda. The Contract Committee meets most Tuesdays at 8:00a.m. All Contracts/Agreements, regardless the amount, must be first approved by the Contract Committee and then presented to the Board of Education for approval and signature. The item will be placed on Electronic School Board for the board agenda by Janet Brown. By following this process, the liability of entering into an agreement is placed with the district rather than an individual.

AGREEMENT FOR THE SERVICES OF LEARNING FOR LIVING, INC.

SPONSOR: Broken Arrow High School
CONTACT: Christian Welborn
WORK PHONE: (918) 259-8571
EMAIL: cwelborn@baschools.org
CELL PHONE: (918) 850-4914

ADDRESS: 1901 E Albany Street
CITY,ST,ZIP: Broken Arrow, OK 74012
ALT CONTACT: Derek Drake
ALT EMAIL:
ALT CELL PHONE: (918) 261-9421

PRESENTATION INFORMATION

SPEAKER: Dean Whellams
DATE(S): Saturday, October 29 - Sunday, October 30, 2022
PROGRAM NAME: Student Leadership Retreat
PROGRAM LENGTH: Parts of Two Days
ADD OF EVENT: New Life Ranch, 160 New Life Ranch Dr, Colcord, OK
ARRIVAL TIME: Saturday AM **COMPLETION TIME:** Sunday 3 PM
AUDIENCE: 200 High School Students

DETAILS: Dean will facilitate a two-day leadership retreat.

FINANCIAL AGREEMENT

*Speaker's fee is **\$6,500.00**. A deposit of \$3,000.00, for presenters travel expenses, is due after May 10, 2022, and remaining balance of \$3,500.00 due thirty days after speaking engagement. Checks are to be payable to Learning for Living, Inc. An invoice is included with this contract. All fees in US funds only. Learning for Living, Inc. Federal ID #20-1038575

*A deposit and a Purchase Order are requested to hold this date.

*Speaker's fee includes all expenses except lodging. **Sponsor is responsible for lodging for night(s) of night of Oct. 29th.**

*In the event of cancellation, four weeks notice is requested. If, through events beyond the control of the speaker, the speaker is unable to appear, Learning for Living Inc. will arrange to send a suitable and qualified replacement, reschedule the engagement or refund the deposit.

*Please provide a wireless microphone and a quality sound system. Presenter will also need a table.

THE ABOVE INFORMATION IS AGREED AND ACCEPTED BY:



Laurie Boyte, Learning for Living, Inc. **April 28, 2022**
Date

Christian Welborn, Broken Arrow High School **Date**

Learning for Living, 52 Night Heron, Chapel Hill, NC 27517
www.learningforliving.com 800/874.1100

Learning for Living, Inc.
 52 Night Heron
 Chapel Hill, NC 27517
 800-874-1100
 laurie@learningforliving.com
 www.learningforliving.com

Quote

BILL TO
Broken Arrow Public Schools Central Warehouse 1810 West Detroit Broken Arrow, OK 74012

SHIP TO
Broken Arrow High School Attn: Christian Welborn 1901 E. Albany Street Broken Arrow, OK 74012

QUOTE #	DATE	TOTAL DUE	DUE DATE	TERMS	ENCLOSED
17048	04/25/2022	\$6,500.00	10/29/2022	Net 30	

SHIP VIA
 In Person

DATE	ACTIVITY	DESCRIPTION	QTY	RATE	AMOUNT
10/29/2022	OTH	Student Leadership Retreat Saturday, October 29 - Sunday, October 30, 2022 Dean Whellams' Fee and Expenses for facilitating two-day retreat;	1	6,500.00	6,500.00

Contact Learning for Living, Inc. to pay.
 Deposit of \$3,000.00 due by June 21, 2022, and a Purchase Order for
 remaining balance is requested to hold this date. Thank you.

BALANCE DUE

\$6,500.00

Request for Taxpayer Identification Number and Certification

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

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
2 Business name/disregarded entity name, if different from above Learning for Living, Inc.	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input checked="" type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ▶ _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
5 Address (number, street, and apt. or suite no.) See instructions. 52 Night Heron	Requester's name and address (optional)
6 City, state, and ZIP code Chapel Hill, NC 27517	
7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
or									
Employer identification number									
2	0	-	1	0	3	8	5	7	5

Part II Certification

Under penalties of perjury, I certify that:

1. 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
2. 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
3. I am a U.S. citizen or other U.S. person (defined below); and
4. 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 for Part II, later.

Sign Here	Signature of U.S. person ▶	Date ▶ January 3, 2022
------------------	----------------------------	------------------------

General Instructions

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

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
 - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
 - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
 - Form 1099-S (proceeds from real estate transactions)
 - Form 1099-K (merchant card and third party network transactions)
 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.