Lived Experience Expert Contracting

# Definitions and Differences

## What are LEE Contractors?

Lived Experience Experts (LEE) are experts who have real-life experience in areas where their input would empower AOC to better serve our clients.

## How is this contracting different than the regular contracting process?

The contracts are often limited in scope of work, encouraging private citizens to provide information about the court programs they have experienced.

LEE typically have not contracted with state organizations and are not familiar with contracting and payment processes.

# Individual LEE

* If the calendar year amount exceeds $600, the LEE interviews or focus group, shares their experience during an educational session, or similar activity
* AOC staff will use the ESA contract request form to initiate the process.
* The LEE must sign the agreement and get a statewide vendor (SWV) number.
* LEE will bill AOC by sending a correct invoice to payables@courts.wa.gov.
* After invoice is approved by AOC employee with budget authority; AOC pays LEE directly using the SWV number.

# Multiple LEE under One Contract

* AOC staff will use the ESA contract request form.
* Contractors are issued an ESA with a “not-to-exceed” amount specified.
* Contractors are responsible for selecting LEE.
* Contractors obtain SWV numbers from the Office of Financial Management.
* Contractors pay LEE
* Contractors submit invoices to AOC by sending the appropriate invoices to payables@courts.wa.gov.

# Single Instance LEE

* One-time agreement with the cost under $600 for the entire calendar year.
* A Standard Letter of Agreement (LOA) and invoice (A19) is drafted by the Project Manager (PM) and signed by the LEE.
* The PM or individual with budget authorization signs and provides the budget code to be used.
* Financial Services makes payment via warrant.
* No SWV number
* Warrants are issued by the Office of the State Treasurer and can be cashed with a valid ID at any US bank.

# Project Manager’s Responsibilities

* Submit a Contract Request Form if using Individual or Multiple LEE
* Draft the LOA and Invoice for Single Instance LEE
* Ensure funds are available in the budget
* Review and approve a draft contract
* Sign LOA and Invoice with LEE and submit to payables once services are complete. (Option 3)
* Review and approve A-19/invoices for contracts
* Keep records of deliverables listed in Contract/LOA

# Contract Specialist’s Responsibilities

* Review Contract Request Form
* Assign a contract number
* Forward a draft contract to the PM for review
* Route/Negotiate confidentiality agreement, finance letter, and contract to signature authorities for all parties
* Maintain the contract file

# Financial Services Responsibilities

* Verifies authorization and budget code
* Makes payment to LEE and contractors
* If the payment is $600 or more, the LEE has to obtain an SWV number through the Office of Financial Management vendor help desk
* If the payment is less than $600 and a LOA was signed and approved by both the LEE and the PM, the payment can be issued directly from AOC

# Invoice Requirements

* The signed letter of agreement
* The LEE name and address
* Tax ID number (TIN, EIN, or Social Security number) or
* SWV number
* Contract number or signed letter of agreement.
* The dollar amount
* Approval from PM and budget code

# Statewide Vendor Process

* Any payment totaling $600 or more cannot be made without the LEE/Contractor obtaining a statewide vendor number.
* LEE/Contractor is responsible for obtaining an SWV number through Office of Financial Management (OFM). Statewide Vendor/Payee Services | Office of Financial Management (wa.gov)
* Financial Services cannot submit these forms for the LEE/Contractor per separation of duty requirements.