

Consultant Services Acquisition Process Total, All-Inclusive Cost Not-to-Exceed \$100,000

Question:

How do I purchase consulting services with a **total, all-inclusive cost** anticipated to be \$10,000 but less than \$100,000 (including travel, lodging, airfare and all reimbursable expenses).

Answer:

Follow this 6-step process:

Step	Why do I need to do this?
<p>1. Clearly define the scope of work and all services that are needed. District expectations of key milestones and deliverables must be included.</p>	<p>This identification of needed services helps to facilitate clear communication of the District’s needs to prospective consultants, and will help the selected consultant to fully meet the goals and objectives of the District.</p>
<p>2. Check the Purchasing Department’s intranet pages for contracted vendors that may be able to fulfill the District’s consulting needs. This check for a contracted vendor should be done before any non-contracted vendor is contacted for consulting services.</p>	<p>To stay in compliance with Arizona School District procurement rules, contracted vendors should be used for services and supplies before non-contracted vendors are sought by the District.</p> <p>What is a contracted vendor?</p>
<p>3. If a contracted vendor is not available that provides the consulting services you are seeking, documentation of Written Quotations must be included with your requisition (i.e. a Written Quote Summary and copies of all written quotes received from prospective consultants). This verifies that a minimum of three vendors were contacted for written quotes that have the ability/are in business to provide this service.</p> <p>For non-contracted consulting services, written quotes must be received from at least two of the prospective consultants contacted</p>	<p>Verifying that at least three vendors were contacted is required to stay in compliance with procurement laws, rules and regulations. Quotes are only valid if the vendor has the ability and are in the business of providing the specified service.</p>

<p>by the District. Additional quotes must be sought until District receipt of at least two written quotes.</p>	
<p>4. Once a consultant is selected under a competitive written quotation process or available under a pre-existing contract, confirm in writing with the selected firm the scope of work, key milestones, deliverables and all other requirements <u>before</u> submitting your requisition. At a minimum, the written Scope of Work must include the following:</p> <ol style="list-style-type: none"> 1. Description of services that will be provided. 2. Dates of Services (if available) 3. Fees for Services <p>The Scope of Work must be scanned and included with the requisition submittal. Requisitions without a Scope of Work will have to be returned to the initiating site. Please <u>do not submit</u> your requisition without a <u>Scope of Work included.</u></p> <p>You may need to request that the selected vendor be added and an Independent Contractor independent contractor form Packet may be required.</p> <p>Upon selection of a consultant, a TUSD Consultant Selection Declaration of Objectivity must be completed and signed, approved and included as one of the uploaded attachments when entering the requisition.</p>	<p>The consultant's <u>Scope of Work</u> is required with requisition submittal. This document verifies that the consultant is aware of and will provide all services they have been contracted for, and that they are charging the correct fees for those services per the terms of the contract or as contained in their services quotation.</p> <p>The Independent Contractor Form may be required for non-contracted vendors who are performing services at District locations. This form protects the District from liability as it provides important information on who we hire to work on our campuses with staff and students.</p>
<p>6. Enter your requisition. Please include a clear detailed description of the type of consulting services requested. One-word descriptions like "consultant" or "training" is not enough for the Procurement Specialist to</p>	<p>It is important to provide a detailed description on your Lawson requisition for the consulting services you are purchasing. Providing this information helps all who review and approve your requisition to be able to answer the</p>

<p>determine if the vendor's services are covered by a current contract. Remember to include any additional required documents needed to process your requisition, such as the vendor's <u>Scope of Work</u>, approved Declaration of Objectivity, and/or the <u>Independent Contractor's form</u> if required.</p> <p><i>You did it! Please submit your req. If you have followed these 6 steps your requisition should flow through the approval process smoothly!</i></p>	<p>following questions concerning the consultant's services:</p> <p>Who? What? When? Why? How Much?</p>
---	---



**DECLARATION OF OBJECTIVITY IN THE ACQUISITION OF
CONSULTING SERVICES**

The undersigned does hereby affirm that, in the selection of consulting services identified below, I am disclosing any conflict, actual or potentially perceived, with the consulting firm selected:

Consulting Services:

Consultant Selected:

YES NO Declaration of previous business and/or personal relationships that may appear to have an (circle one) effect on selection of a consultant (if yes, attach Disclosure of Relationship Statement)

Printed Name:

Signature:

Date

Chief Financial Officer or Director of

Purchasing:

_____ Date _____