

Checklist for Consulting Services

This list represents information that will be necessary to promptly purchase consulting services with ARRA stimulus money.

Select the appropriate side of the checklist by determining what type of a purchase you're doing:

- o **DIRECT BUY** – purchase under \$3,300 does not require any documentation
- o **SOLE SOURCE** – purchase over \$3,300 where only a single supplier provides the necessary product/service
- o **COMPETITIVE PURCHASE** – purchase over \$3,300 where many suppliers/distributors are available

SOLE SOURCE PURCHASE	COMPETITIVE PURCHASE
<p>Sole Source Justification Checklist In addition to a "purchase requisition" for contractor services, the following documents are required before contracts can be executed.</p> <ol style="list-style-type: none"> 1. <input type="checkbox"/> Completed Sole Source Justification Form found online at: http://www.washington.edu/admin/purchstores/docs/index.php#vendors 2. <input type="checkbox"/> Copy of the page from the grant showing where the Contractor is <u>specifically named</u> to perform the service. 3. <input type="checkbox"/> Form 1632 – Employee vs. Independent Contractor Checklist Mandatory by the IRS; for payments to individuals. (Go to: www.washington.edu/admin/sp/office/EmployeeVs.pdf and print) 4. <input type="checkbox"/> Scope of Work (Statement of Work), signed by the Contractor showing: <ol style="list-style-type: none"> a. Start date and end date of service (mandatory). b. Clear description of services the Contractor is to perform; c. Include due dates for any written/oral reports or other deliverables. d. Contractor hourly rates & number of hours required to do the work; cost per deliverable; allowable expenses (if any) total cost of contract. 5. <input type="checkbox"/> Contractor's Proposal if provided instead of a scope of work but it must include all information as required in #4 above & should be signed by Contractor 6. <input type="checkbox"/> Completed IRS W-9 Form- Request for Taxpayer Identification Number and Certification. Go to: www.irs.gov Click on Form W-9 and print 	<p>COMPETITIVE SOLICITATIONS (RPF, RFQ, RFQQ ETC.,) FOR PERSONAL SERVICE (CONSULTING) PLEASE CONTACT US ASAP:</p> <p>PAUL BORG, SCM pborg@u.washington.edu</p> <p>DAWN LAKE, Buyer II dawnlake@u.washington.edu</p> <p>Kathryn Harrington, Operations Manager harringt@u.washington.edu</p>

For additional information and forms visit our web site: <http://www.washington.edu/admin/purchstores/docs>

For contact information please see: <http://www.washington.edu/admin/purchstores/buyers>

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