

## Consulting and Professional Service Confirmation Form

This Confirmation Form is associated with University Policy [No. 1221](#) and is a prerequisite for procuring consulting and professional services under the associated Procedure 1221-PR4: Consulting and Professional Services (the “*Procedure*”). A requisition will not be approved until completion of this confirmation by the requesting unit’s Vice President or Dean and the department head or unit director (if a non-academic unit). **Please complete this Confirmation Form and attach it to the requisition in EZ-Buy.** If questions arise, please consult USU Policy 1221 and the Procedure or reach out to Purchasing and Contract Services.

**Threshold:**

The threshold for an engagement under this Procedure is **\$100,000.00**. This threshold applies to the entire project with the service provider regardless of time duration. The \$100K threshold applies to each Engagement (as defined below) and not per service provider or fiscal year. Should the use of a service provider be sought multiple times under this Procedure, a new confirmation must be completed and submitted.

**Questionnaire:**

Department Information:

|                           |  |
|---------------------------|--|
| Department:               |  |
| Department Head/Director: |  |
| Contract Manager*:        |  |

\*person responsible for managing the relationship between USU and the service provider

Proposed Service Provider Information (“*Service Provider*”):

|  |  |        |  |
|--|--|--------|--|
| Name:  |  |        |  |
| Address:   |  |        |  |
| Phone:   |  | Email: |  |
| Contact Person (if service provider is a company): |  |        |  |

Please describe the scope and objective of the project (“*Engagement*”):

|                          |  |
|--------------------------|--|
| Description of Services: |  |
| Anticipated Duration:    |  |
| Anticipated Budget:      |  |
| Additional Notes:        |  |

Has this department/unit previously engaged this Service Provider using this Procedure?

- Yes
- No

Are the services to be procured “Consulting Services” or “Professional Services” as defined in Procedure 1221-PR\_: Consulting and Professional Services?

- Yes
- No



Will the total amount for this Engagement exceed the \$100,000.00 threshold?

- o Yes
o No

Would this transaction give rise to a conflict of interest as defined in University Policy No. 2301: Individual Conflicts of Interest or University Policy 2300: Institutional Conflicts of Interest?

- o Yes
o No

By signing below, I confirm that:

- The answers to the questionnaire are to the best of my knowledge true and accurate.
The Service Provider is qualified to provide the services described herein
I have carefully reviewed the qualifications and quote(s) of the Service Provider and believe that this Service Provider will provides an excellent value to USU
The total lifetime value for this Engagement is less than the \$100,000.00 threshold.
This Engagement is not intended to be used as a "springboard" to later claim sole source or need for compatibility for future projects.
If the Service Provider has been previously engaged by my unit, that this Engagement is unrelated and materially different from any previous project(s).
My recommendation to award a contract to the Service Provider has not been influenced by any improper relationships with, connections to, or favoritism to the Service Provider.
There are no restrictions on funding that would prohibit the use of this Procedure (e.g., federal grants requiring competitive process) for this Engagement.
I understand that the Service Provider recommended for award may not begin work until this document has been approved and a requisition/Purchase Order has been approved and completed in EZ-Buy.

Dean or Vice President

Department Head or Director (if applicable)

By: \_\_\_\_\_

By: \_\_\_\_\_

Print Name: \_\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

\* Attach this Confirmation Form to the requisition in EZ-Buy.

Reviewed and Approved by Purchasing and Contract Services:

By: \_\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_