GENERAL GUIDELINES FOR
CONTRACTING FOR SERVICES, CONSULTING, TEACHING

Requisitions should be submitted at least a month prior to the start of delivery of services. This will allow time for Procurement to obtain signed agreements with the service providers, and to have a PO in place prior to services commencing. Requisitioners must provide the following information on the requisition. Items noted as "**" are required information.

1. **Name of UMB Project Coordinator**
   a. Phone / fax
   b. mail address

2. **Scope of Work (this section defines the “who”, “what”, “how” of the proposed consulting agreement)**
   a. *what is to be done
   b. *what are the deliverables (reports, etc)
   c. *who is going to do what
   d. *how is the work going to be done

3. **Term of Agreement (“when” the proposed work will be done)**
   a. *Specific start (effective) date
   b. *Specific end (expiration) date
   c. Number of renewals allowed

4. **Payment Terms (“how much” will it cost)**
   a. *how much is consultant to be paid:
   b. *how is payment calculated:
      i. hourly
      ii. daily
      iii. weekly
      iv. monthly
      v. single payment at end
      vi. Progress / milestone pymt.
      vii. Other (identify)

5. **Consultant information (for sole source service providers determine if consultant is in UMB vendor table)**
   (note: agreement cannot be with a Maryland state employee, nor a Maryland state retiree within 45 days of their retirement date)
   a. *Name
   b. Address
   c. *Phone / Fax Nos.
   d. *Email Address
   e. *SS # or FEIN, if not in UMB vendor base

6. **Attachments**
   a. Agreements, etc for documentation and signature
   b. Sole source with attachments
   c. Is this a renewal? If so, what PO is it replacing
   d. Misc. information pertaining to the proposed agreement