

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