

## Professional Services

Updated: 3/11/2020

### Purpose

This procedure is issued to provide guidance on contracting for professional services.

### Policy

This procedure is issued in accordance with The University of Texas at El Paso Procurement Operating Procedures and Texas Government Code Section 2254, Subchapter B.

### Procedures

1. When requesting approval on a professional services, consider the following:

- **Obtain clear description of the service.**

Create a statement of work. This list of details defines the work required and assists in preparing the contract for services.

- **Gather other necessary documentation.**

This page includes guidelines for providing written justification when you don't obtain competitive bids.

- **Get quotes/ competitive bids.**

Although obtaining quotes is not essential, it is highly recommended and may be useful in choosing the best provider. If obtaining quotes, attach documentation to the professional services form.

- Ask the potential service provider to provide a quote that defines the services to be performed and what the provider will charge for those services.
- Ask for the contractor's information; FEIN, address, telephone number, fax number, and e-mail address.
- Ask for terms and conditions of service.

- **Choose the best contractor which best suits the needs of the department.**

Select the best provider based on the following criteria:

- Experience
- Referrals
- Recommendations
- Evaluation of past work
- Cost of services

- **Disclose Employee-Supplier relationship.**

If an employee-supplier relationship exists, please disclose this information.

2. To process an Exclusive Acquisition Professional Services Form:

- Complete the electronic Exclusive Acquisition Professional Services Form available in Miner Mall regardless of the total cost of services.
- Include and attach any of the following for Purchasing to review:
  - Quotes
  - Service agreements
  - Engagement letters
  - Letters of Intent
- Submit the Electronic Form so that it may route to the appropriate Department Approvers.
- Form will then route electronically to the Purchasing Department for final approval.
- If you have any questions regarding the use of this form, please contact your purchasing representative or call ext. 5601. To contact your Buyer, please see “Who's My Buyer?” <https://www.utep.edu/vpba/minermall/who-is-my-buyer/index.html>

Note: You must provide a thorough and complete response to all the considerations. Any Agreements must be forwarded to Purchasing for review, approval and signature.

### **Applicability**

This administrative procedure applies to all University departments.

### **Definitions**

**Professional Services** - services that include accounting, professional engineering, architecture, land surveying, medicine, optometry, real estate appraising. These contractors use a FEIN (Federal Employer Identification Number) for tax purposes.

**A Statement of Work** - should include, but is not limited to, all of the following:

**Project scope:** Describe the work being provided, including any work plan, required deliverables, milestones, performance standards, and due dates.

**Period of performance:** List the start and end date for the entire project.

**UTEP Project Manager:** Indicate the name of the designated UTEP employee who has authority over the work.

**Title:** Include the name of contract, grant or project, if applicable.

**Physical Location:** Describe where the work will be performed.

**Supplies and Equipment:** List the supplies and equipment that will be used.

**Payment Rate:** State the dollar amount computed by job, month, day or hour.

**Total not to exceed:** State the total dollar amount that the purchase order can't exceed.

**Payment Terms:** Provide any special terms of payment requested by the worker.

**Employee-Supplier Relationship:** Disclose the relationship on Form.

**Worker's citizenship:** Provide country and visa status if worker is not from the United States.

**Miner Mall** - Miner Mall is an electronic procurement marketplace that is the University's tool for the issuance, approval and payment processing of all University Purchase Orders.

**Responsible Party**

Associate Vice President, Purchasing & General Services