

Procedures for Requesting Consultant Services

Purpose

- A request for **Consultant Services** must be used for procurement of **all** professional consultant services on a fee basis for a workshop, seminar, or other training activity or for evaluating areas of district operations, assisting with district assessments or providing expertise beyond what district staff can provide.
- The use of consultants is appropriate as a means of providing the district with invaluable specialized services. However, the use of consultants who promote a particular commercial product or service is discouraged.
- When a consultant is used, the requestor must make it clear to the consultant that he/she is to perform as a consultant and **not** as a salesperson.
- **Prior approval in writing** using the **Request for Consultant Services** form must be obtained before securing a consultant.

Instructions

Step 1- Complete and sign the **Request for Consultant Services** form. (reverse side)

Step 2- Submit **all three copies** of the form to the fund custodian for approval.

Step 3- If the fund custodian **approves** the request, **all three copies** must be forwarded to the procurement director. If the fund custodian **does not approve** the request, copies should be returned to requestor.

Step 4- The procurement director **must evaluate** the request for its adherence to district and state procurement codes and forward **all three copies** of the request to the superintendent.

Step 5- If the superintendent

- **Does not approve** the request, the superintendent must return the form to the fund custodian
- **Approves** the request, the superintendent must return **all three copies** to the procurement director.

Step 6- The procurement director must distribute the **copies** as follows:

- **White**.....Procurement **Yellow**.....Fund custodian **Pink**.....Accounting

Step 7- The fund custodian **must** prepare a purchase requisition in CSI. The requisition must list

- Consultant fees
- Consultant expenses including travel (airfare, mileage, rental car) lodging, meals, and materials
- Information on how the consultant will be paid-prepaid by mail, prepaid by hand-delivered check on day of service **or** paid after services are rendered.

Step 8- An original invoice must be received from the consultant before payment can be made.

- If the consultant requests to be **prepaid before** the day services are rendered or **on the day** services are rendered, the consultant must send an **original invoice** to the district before he/she can be paid.
- If the consultant requests to be **paid after** services are rendered, the consultant must send an **original invoice** to **Accounting Department, Chesterfield County School District**

