

Hire a Consultant Guide

Prepared by Fiscal Learning & Engagement



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Introduction

Departments may choose to hire consultants by following the steps below. A list of commonly used contracted vendors is available [here](#). All forms mentioned below are also available on the Forms & Instructions page at <https://fiscal.gmu.edu/forms-and-instructions/>.

Step 1 – Gather Information

1. The consultant must submit a **Proposal for Services** available at <http://fiscal.gmu.edu/wp-content/uploads/2014/10/Proposal-for-Service.pdf>. The attached statement of work should include a price quote and all expenses, including travel, if applicable.
2. The department must complete the following
 - a. A **Cost/Price Analysis** available at <http://fiscal.gmu.edu/wp-content/uploads/2014/10/Cost-Analysis-for-Contracted-Services.pdf>.
 - b. An **Employee/Contractor Evaluation**, when hiring an individual and not a company, available at <http://fiscal.gmu.edu/wp-content/uploads/2013/09/IndependentContractorEvaluationForm.pdf>.
 - c. A **Substitute W-9** for tax purposes, if the individual/company has never been paid by Mason, available at https://www.doa.virginia.gov/forms/CVG/W9_COVSubstitute.pdf. Use the Vendor G# lookup to see if a G# exists for the vendor at <https://famap.gmu.edu:8250/pls/apex/f?p=105:101>:. The department may submit the W-9 to papadmin@gmu.edu with a note to establish a G# and eVA vendor ID if one does not exist.
 - d. A **Sole Source Procurement Approval Request**, if the service is over \$100,000, the particular consultant is not currently on contract and is the only one who can perform the services (rendering competition impracticable). Form available at <http://fiscal.gmu.edu/wp-content/uploads/2013/09/Sole-Source-2016.pdf>. Contracted vendors do not require competition or a Sole Source Approval Request. A list of commonly used contracted vendors is available [here](#).

Step 2 – Create a Purchase Requisition

1. Submit a purchase requisition through eVA, as a non-catalog order. Additional instructions for completing an eVA order are available, here: <https://fiscal.gmu.edu/purchasing/purchase-goods-or-services/over-5000/>
 - a. Attach the **Cost/Price Analysis, Proposal for Services, Employee/Contractor Evaluation** (if applicable) and the **Sole Source Procurement Request** (if applicable).
 - b. ****Do not attach the W-9 to the eVA order****
2. Expenditures of \$25,000 or more from any fund beginning with a “2” require approval from the Office of Sponsored Programs (OSP). These transactions will automatically route to OSP. A post audit review of transactions under \$25,000 is conducted by OSP.

For questions about purchasing consulting services please contact the Purchasing Office at purch1@gmu.edu. Additional resources for using the eVA procurement portal are available at <https://fiscal.gmu.edu/purchasing/use-eva-purchasing/>.