

Request for Consultant Services

Use the following format to prepare a narrative Request for Consultant Services. This information will be used for Davis campus or UCDHS review of your request and as the basis for preparation of proposals by prospective consultants. Send the narrative along with your request to the appropriate contracts office (Davis campus Business Contracts, or UCDHS Business Contracts). The request will require the additional approval of the appropriate dean or vice chancellor in your division. Your request will be processed after review by the appropriate contracting office to ensure the proposed consultant services are in compliance with applicable University policies.

1. **IDENTIFYING INFORMATION.** Identify your department and provide the name and phone number of the project director.
2. **WORK DESCRIPTION.** Describe the situation or problem to be studied.
3. **OBJECTIVES.** Describe the objectives of the study and the deliverables you expect (Report, etc.).
4. **JUSTIFICATION.** Explain why the need for services cannot be met within the University.
5. **SCOPE OF WORK.** Describe scope of the work, including: (a) any desired approach to the problem; (b) specific limitations; (c) questions requiring answers; (d) the extent to which the study will involve collection of information about individuals; (e) format for the completed report; and (f) the extent to which assistance and cooperation from the University will be available (e.g., working space, equipment, furniture, utilities, and services).
6. **CONTRACT OR GRANT.** If the services are to be performed in connection with a contract or grant, state the name of the sponsoring agency, title of the project, identification number, and fund number. Attach pertinent extracts of the contract or grant.
7. **PROJECT SCHEDULE.** Indicate the firm or estimated time schedule, including dates for commencement of performance, submission of progress reports, and completion of the service, including receipt of final report or other deliverables.
8. **PAYMENT.** Indicate maximum cost limit for the project and to what extent progress payments will be allowed. Designate the account and fund to be charged.
9. **POTENTIAL CONSULTANTS.** Provide the name and address of each potential consultant who will be asked to submit proposals. If the amount of payment to the consultant is expected to be \$15,000 or more in any 12-month period, proposals must be solicited from three or more qualified consultants; if you wish to request an exception to this requirement, provide full justification why competition is not feasible using a Sole Source Justification and Disclosure document (<http://ucdmm.ucdavis.edu/contracts/index.html>). (Solicitation of competitive proposals for agreements under \$15,000 is recommended, but not required.)
10. **APPROVALS.** The request must be approved by the department chair, department head or director, and by the appropriate dean or vice chancellor.