King County Human Resources Division, through a competitive RFQ process, has entered into master contract purchase agreements with consultants with proven track records in Workplace Investigations. King County agencies may enter into work orders and use these experts without going through a separate contracting process, saving the county considerable time and money. All costs for external consultants are paid by the requesting department.

**The Work Order Process**

**Work with a consultant from the consultant pool shall not begin until the proper paperwork is completed and signed by HRD.**

**Step 1: Solicitation**

To meet the county's procurement requirements, any work expected to be $10,000 or more but less than $50,000 must be solicited from at least 3 consultants in the pool.  If the work order is expected to be $50,000 or more, the agency must solicit *all* consultants on the list. Departments are not required to solicit for single purchases of less than $10,000, but it is advised that departments solicit from at least 3 consultants in the event that the scope expands. *Although a solicitation is not required for work less than $10,000 a Consultant Selection Information form must still be completed.*

Please do not use a single consultant repeatedly; although past work at the agency may be criteria for evaluating the consultant’s bid to perform future work, there must be still be a competitive process. *If it is necessary to use the same consultant, the agency must go through the Waiver process for permission to use the consultant before any work begins. If the Procurement Waiver is approved, the agency must attach the approved Waiver to the request to HRD.*

To solicit from the consultant list, you may email consultants with a summary of the project and request that consultants interested in the work respond within a reasonable time with information to help you evaluate their proposal. This information may include: price, availability and ability to meet the deadline, and the consultant’s work history performing similar work. Solicitations may be done by fax or email. All bids and rating materials – paper and electronic - shall be retained by the agency for a period of three (3) years.

**Step 2: Consultant Selection Information Form**

Once you have selected a consultant, please fill out and sign the attached Consultant Selection Information Form and send it to the consultant for signature. The Consultant Selection Information Form may be faxed or scanned, and originals are not required.Send the completed Consultant Selection Information form to HRD (Greg.Felton@kingcounty.gov). Attach additional pages, including the solicitation and bid documents, if necessary. HRD will review and approve the use of the consultant, and will notify Procurement & Contract services. HRD will next return a copy of the approved form to the agency contact and the consultant, with additional instructions for the agency. The form will include a Contract Purchase Agreement (CPA) number, which will be needed to pay consultant invoices.

**Step 3: Requisition & Purchase Order**

Accounts Payable recommends entering a requisition and creating a purchase order for each invoice as it arrives. Agencies may not create a “drawdown” purchase order. You may create multiple purchase orders under the same work order, so long as the total dollar amount of the CPA is not exceeded.

An online Requisition and purchase order must be created by the agency in Oracle EBS:

* Choose a “Non Catalog Request.”
* Item Type is “Services Billed by Quantity”
* Enter the CPA number found on the approved Consultant Selection Information form in the Contract Number field.
* Item description – Use the standard format for your department, which may include the consultant name, the invoice to be paid, and some description of the services. (For example: “ABC Consulting – Discrimination Complaint Investigation -invoice #1234”)
* Suggested NIGP Code is **918.00 “Consulting Services”**
* Enter the amount of the invoice. (Quantity = “1”, Unit of Measure = “Each”, and Rate per Unit = dollar amount of the invoice)
* Buyer – Nakamichi, Victoria

Once approved by your agency Oracle Approver, the Procurement and Contract Services Section (PCS) Buyer will create a Purchase Order. You may then receive the invoice in Oracle EBS, and send the original invoice to Accounts Payable for payment. Remember to write the Purchase Order number on the invoice before sending it to Accounts Payable.

**Other Information:**

HRD does not need copies of the invoices, or the consultant work product. Agencies should retain copies of the solicitations, responses and selection materials for 3 years in case of audit or a public records request.

In some cases, the agency may request follow-up work beyond the original scope of the work.  If additional time or compensation is needed, the CPA may be amended quickly with a single-page work order amendment.  Please contact HRD for a copy of this form, which must again be signed by the project manager, consultant, and HRD. HRD will transmit the signed contract amendment form to Procurement.

The King County Prosecuting Attorney’s Office (PAO) is not required to use a competitive process to procure legal services in defense of the County, and does not need to use the consultant pool or follow the consultant selection process.  However, if an agency other than the PAO is paying for a workplace investigator from the pool, that agency or PAO will need to work with HRD to get a work order number.

If there are any questions or problems, or if you have any feedback to share about your experience with a consultant, please contact HRD.