

## Professional Services Matrix

**Instructions:** This matrix is provided as a guide to assist departments with the documents required to engage Professional Service Providers. Departments are responsible for ensuring that the competitive process is followed and that the appropriate supporting documentation is attached. The Professional and Technical Services Box on Page 2 of the Sole/Single Source Procurement Form should be selected and a detailed explanation must be provided as to why the supplier is selected for the engagement (Unique Qualifications, Certifications, Experience, etc.). Additionally, a CV/Resume/Bio of the individual or firm must be attached. Please refer to the Purchasing and the Professional Service Provider Policies for additional information. The required forms can be found at <http://procurementservices.rutgers.edu/policies-forms/forms-repository>

**NOTE: Professional Services are not allowed on Quick Orders.**

Departments are encouraged to submit contracts at least 60 days prior to the contract start date to allow University Procurement Services sufficient time to review and negotiate terms and conditions, if required.

This list is not all inclusive; therefore, if you have any questions regarding this matrix, please contact [procure@finance.rutgers.edu](mailto:procure@finance.rutgers.edu) with any questions that you may have and address your inquiry with the subject line: Professional Services.

| Type of Professional Service Provider   | Requisition Type   | Required Documents                    |      |       |     |
|---|--------------------|---------------------------------------|------|-------|-----|
|   |                    | ICED                                  | PSPA | ITPSA | SOW |
| Accountant (Auditing related services)  | Contact Controller | N/A                                   |      |       |     |
| Advertising Agencies  | Purchase Order     | X                                     | X    |       |     |
| All media (i.e. Actor, Performer, Musician, Announcer, Speaker-Talent Agency/ Booking Agent; (Entertainment)) | Check Request      | <a href="#">Performance Agreement</a> |      |       |     |
| Speaking Engagements by Guest Lecturers, (Educational, one-time and under \$5,000)                            | Purchase Order     | X                                     |      |       | X   |
| Appraisal Services  | Purchase Order     | X                                     | X    |       |     |
| Architect   | Contact Facilities | N/A                                   |      |       |     |
| Art Conservator/ Curator  | Purchase Order     | X                                     | X    |       |     |
| Auditor (Financial)   | Contact Controller | N/A                                   |      |       |     |
| Construction Project Management   | Contact Facilities | N/A                                   |      |       |     |
| Curriculum Developer  | Purchase Order     | X                                     | X    |       |     |
| Engineer  | Contact Facilities | N/A                                   |      |       |     |
| Environmental Consultants   | Purchase Order     | X                                     | X    |       |     |
| Event/Meeting Planner   | Purchase Order     | X                                     | X    |       |     |
| Financial Adviser   | Purchase Order     | X                                     | X    |       |     |
| Graphic Designer  | Purchase Order     | X                                     | X    |       |     |

| Type of Professional Service Provider   | Requisition Type                  | Required Documents |      |        |     |
|---|-----------------------------------|--------------------|------|--------|-----|
|   |                                   | ICED               | PSPA | ITPSPA | SOW |
| IT Services (i.e. Database analysis/management)   | Purchase Order                    | X                  |      | X      |     |
| IT Services (i.e. Network administration, network development)  | Purchase Order                    | X                  |      | X      |     |
| IT Services (i.e. Programming, software development)  | Purchase Order                    | X                  |      | X      |     |
| IT Services (i.e. Telecom design and administration)  | Purchase Order                    | X                  |      | X      |     |
| IT Services (i.e. web design, development, administration and hosting)  | Purchase Order                    | X                  |      | X      |     |
| Landscape Designer Architect  | Contact Facilities                | N/A                |      |        |     |
| Lawyer or Legal Support Services  | Contact Office of General Counsel | N/A                |      |        |     |
| Medical Support Services (i.e. Coder, Data Analysis, Transcriber, etc.)   | Purchase Order                    | X                  | X    |        |     |
| Management/Business Consultant  | Purchase Order                    | X                  | X    |        |     |
| Marketing Services (i.e. Public Relations, Marketing Surveys, etc.)   | Purchase Order                    | X                  | X    |        |     |
| Patent Search Services (i.e. Licensing)   | Purchase Order                    | X                  | X    |        |     |
| Photographer/Videographer   | Purchase Order                    | X                  | X    |        |     |
| Production Services (i.e. Theatrical, Musical, Film-making, Boom Operator, Camera, Grip, Lighting, Voice-over, Video/Media, etc.) | Purchase Order                    | X                  | X    |        |     |
| Professional Development Training   | Purchase Order                    | X                  | X    |        |     |
| Search Firm (i.e. Executive/Professional)   | Purchase Order                    | X                  | X    |        |     |
| Social Workers  | Purchase Order                    | X                  | X    |        |     |
| Staffing Services (Temporary)   | Purchase Order                    | X                  | X    |        |     |
| Temporary Employment Services (i.e. Locum Tenens, Physicians, Nurse, Technicians, etc.)   | Purchase Order                    | X                  | X    |        |     |
| Therapist (i.e. Massage, Speech, Occupational, Behavioral, etc.)  | Purchase Order                    | X                  | X    |        |     |
| Translation Services  | Purchase Order                    | X                  | X    |        |     |
| Writer/Author   | Purchase Order                    | X                  | X    |        |     |

**Legend:**

ICED = Independent Contractor or Employee Determination Form

ITPSPA = IT Professional Service Provider Agreement

PSPA = Professional Service Provider Agreement

SOW = Scope of Work