Step 3a Sponsoring Management Center (noted in Step 2) submits this approved form with contract to Campus Services, Adelbert Room 229, LOC 7003 for routing to applicable VP noted below for approval.

☐ Architectural Services: Senior VP for Administration Engineering, Feasibility, Construction, Planning
☐ Consulting Agreements (other): Senior VP for Administration for non creative services
☐ Creative Design (Print and Web): VP for Marketing and Communications
☐ Legal Services: Vice President and General Counsel
☐ Financial & Accounting Services: Senior VP Finance/CFO

Signature Date

Step 3b For UGEN initiated Exemption Requests, in addition to the foregoing VP approvals, the University CFO must also approve. Campus Services routes to Procurement Services, LOC 4909.

☐ CFO (For UGEN submissions only)

Signature Date

Questions may be directed to contracts-pds@case.edu or to Procurement and Distribution Services at 216-368-2560

PROCESSING INFORMATION – PROCUREMENT OFFICE USE ONLY
All must be present to process PO and for work to begin (See Purchasing Policy -https://case.edu/policies/media/caseedu/business-policies/procurement2014-04-30.pdf)

☐ Quote or Proposal
☐ Professional Services Exemption Form
☐ Contract to be executed
☐ Approved Requisition (in PeopleSoft)

Date Received Buyer/Agent Name Purchase Order #

Procurement Office notes:
Professional Services Bid Exemption Approval Form
for Services above $25,000

Step 1 Complete Description of Service. Attach quote and contract to be executed to this request.

<table>
<thead>
<tr>
<th>Name of Contract/Proposal</th>
<th>Description of Service</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Case Contract/Proposal Initiator Name</th>
<th>Department</th>
<th>Email</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contract/Proposal Amount (12 month aggregate)</th>
<th>Term of Engagement (Dates)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Describe in detail (or attach) here the justification for this Bid Exemption Request for Professional Services exceeding $25,000. Include Price Reasonableness description and detail on how pricing was validated. See Purchasing Policy, Bids and Quotations for information:

---

Type of Service (Check one)

- [ ] Architectural Services
- [ ] Consulting
- [ ] Creative Design
- [ ] Engineering
- [ ] Feasibility Study
- [ ] Legal Services
- [ ] Financial
- [ ] Planning
- [ ] Other [ ]

---

Step 2 Submit this request with quote and proposal to Sponsoring Management Center Dean or their authorized designees/school CFO for approval. Management Center to send Completed Packet for routing to Campus Services, Adelbert Room 229, LOC 7003

Sponsoring Management Center Dean Approval

- [ ] Dean
  - Print Name
  - Signature
  - Date

OR

- [ ] School CFO/Designee
  - Print Name
  - Signature
  - Date

Page 1 of 2

Last Updated: 10/18/2017