



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.

Name of Contract/Proposal _____ Description of Service _____

Case Contract/Proposal Initiator Name _____ Department _____ Email _____ Title _____

Contract/Proposal Amount (12 month aggregate) _____ Term of Engagement (Dates) _____ Requisition Number _____

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 a quote and proposal to the Sponsoring Management Center Dean or their authorized designees/school CFO for approval.

Sponsoring Management Center Dean Approval

Dean _____
Print Name Signature Date

OR

School CFO/
Designee _____
Print Name Signature Date

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Step 3a: Sponsoring Management Center send Completed Packet for routing to contracts-pds@case.edu for routing to applicable VP noted below for approval. Please note in the subject line "Professional Services Bid Exemption Approval Form".

- | | | |
|--|--------------------|---------------|
| <input type="checkbox"/> Architectural Services: Senior VP for Campus Planning & Facilities Management | _____ Signature | _____ Date |
| <input type="checkbox"/> Consulting Agreements (other): VP for Campus Services | _____ Signature | _____ Date |
| <input type="checkbox"/> Creative Design (Print and Web): VP for Marketing and Communications | _____ Signature | _____ Date |
| <input type="checkbox"/> Legal Services: Vice President and General Counsel | _____ Signature | _____ Date |
| <input type="checkbox"/> 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.**

- | | | |
|---|--------------------|---------------|
| <input type="checkbox"/> 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
- Justification for Price Reasonableness
- Professional Services Exemption Form
- Contract to be executed
- Approved Requisition (in PeopleSoft)