King County’s Continuous Improvement Team, through a competitive RFQ process, created a talent pool of consultants with proven track records in Lean Consulting. The County has entered into master contract purchase agreements with these consultants. 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 CIT.**

**Step 1: Solicitation**

To meet the county's procurement requirements, any work order expected to be more than $5,000 but less than $25,000 must be solicited from at least 3 consultants in the pool.  If the work order is expected to be more than $25,000, the agency must solicit *all* consultants on the list. 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 CIT.*

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 CIT (lean@kingcounty.gov). Attach additional pages, including the solicitation and bid documents, if necessary. CIT will review and approve the use of the consultant, and will notify Procurement & Contract services. CIT 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 **C**ontract **P**urchase **A**greement number, and a PCS service request number.

**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 work order is not exceeded.

An online Requisition must be created by the agency in Oracle EBS. The requisition should include:

* Choose a “Non Catalog Request.”
* Item Type is “Services Billed by Quantity”
* You may reference the CPA number in the Contract Number field, or search in Supplier Name for the consultant.
* Item description – please include the consultant name *and the PCS service request number from the approved Consultant Selection Information form*. This notifies the Buyer that the work has been approved by CIT. (For example: “ABC Consulting – Lean Consulting (SR #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.

**Other Information:**

CIT does not need copies of the invoices, or the consultant work product. CIT does request from the consultant a brief summary of the work performed and of the process improvements and outcomes and impacts obtained. 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 and compensation is needed, the work order may be amended quickly with a single-page work order amendment, available from Procurement.  Please send an extra copy of the completed amendment to CIT.

Please remember, agencies will need to submit another electronic requisition to Procurement to increase the existing Purchase Order for the amount approved on amendment for the Work Request. In the description line, please indicate the existing Purchase Order number that will have funds added.

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