**PennDesign FAO**

**Independent Service Provider (ISP)**

***ISP Procedure Reminders:***

Departmental coordinators responsible for budget management, or those delegated to do so by such individual, must provide a Limited Engagement Contract to ISP Limited Service Providers in advance of engagement.

* + The (LE) Contract must be submitted to [pdpo@design.upenn.edu](mailto:pdpo@design.upenn.edu) prior to event
  + The (LE) Contract **MUST be reviewed, approved and signed by** **Penn Purchasing** **PRIOR** to the ISP engaging in services in order for them to be eligible to provide services and receive payment
  + Timeline for Services provided by ISP LE has been expanded a bit:

*Limited Engagement Fee:  A Limited Engagement Fee is a payment to an individual (non-employee/faculty, non-student) for providing a service of an academic nature, short duration, and low dollar amount ($1,000 or less per transaction; $5,000 per year max).  This is intended for guest speakers, guest lecturers, artists, performers, writers/editors, board members, critics, preceptors, and mentors meeting the fee guidelines. It is still intended for a ‘limit time’ but based on the service and/or amount of fee being paid, we have removed the ‘one time per year’ qualifier.*

Departmental coordinators responsible for budget management, or those delegated to do so by such individual, must provide a Service Provider Questionnaire (SPQ), Scope of Work with Quote, and any applicable materials (such as W-9) well in advance of services to be provided

* + The above mentioned materials should be submitted in one email to [pdpo@design.upenn.edu](mailto:pdpo@design.upenn.edu) with as much advance notice of services as possible
  + The SPQ will be reviewed by the business manager and director of finance for the school
  + The materials and contract **MUST be reviewed, approved and signed by Penn Purchasing PRIOR** to the ISP engaging in services in order for them to be eligible to provide services and receive payment
  + Once an ISP IC has been onboarded by Penn Purchasing, follow up engagements will not require the SPQ, however, a scope of work and/or quotes for services will be required for subsequent engagements

[ISP Forms and Additional Information](https://www.hr.upenn.edu/policies-and-procedures/processes-and-procedures/service-provider-classification)

*A Note on Competitive Bidding:*

All services totaling over $5,000.00 regardless of service providers status, be it ISP or a vendor with an EIN, must be accompanied by 3 competitive bids OR a bid waiver *unless* the vendor is a preferred contract vendor with Penn.

* + A list of Penn Preferred Contract Suppliers can be found [here](https://cms.business-services.upenn.edu/purchasing/making-purchases/find-a-supplier/supplier-search.html). Use the Supplier Type drop down box to select Preferred Contract Suppliers only
  + Competitive Bidding Policy [www.finance.upenn.edu/vpfinance/fpm/2300/2300\_pdf/2308.pdf](http://www.finance.upenn.edu/vpfinance/fpm/2300/2300_pdf/2308.pdf)