

Contracting & Procurement Services (CAPS)

Contracting and Procurement Services (CAPS) provides guidance, support, and leadership throughout the campus procurement process to support the academic and research mission of the University. Our commitment is to provide fair, cost-effective, efficient procurement services that promote integrity, transparency, and accountability.

CAPS is committed to pursuing best value solutions through fair and competitive processes while maintaining professionalism, customer service, and compliance with all applicable laws and regulations.

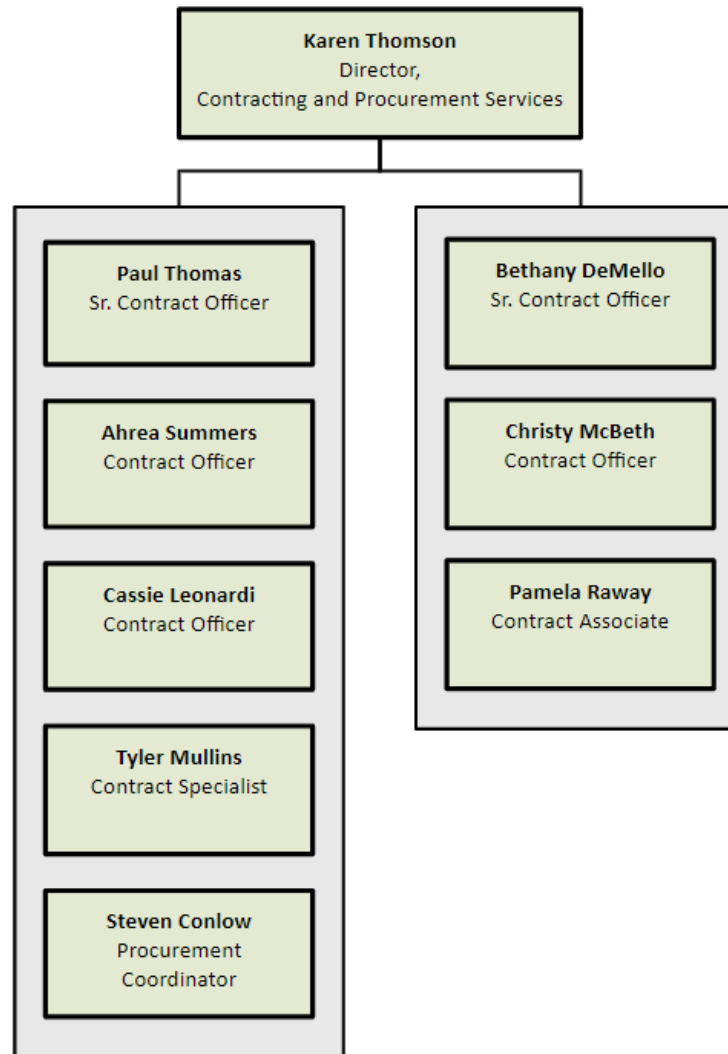
About Contracting & Procurement

- Department within Finance and Administration (FADM).
- Oversee contracting and procurement activities for the University, including goods, equipment, services, and capital construction.
- Serve as consultant, trainer, advisor, and partner in contracting and procurement activities of all types.
- Ensure PSU complies with federal, state, and local requirements for public contracting and procurement.
- Located in Richard and Maurine Neuberger Center (RMNC), Second Floor.

About Contracting & Procurement

- Review, negotiation, and execution of contracts.
- Develop and manage solicitations including Request for Quotes (RFQ), Request for Proposals (RFP), Invitations to Bid (ITB), and Request for Information (RFI)
- Provide training on best contracting and procurement practices.
- Promote the purchase of sustainable and accessible products and equipment
- Promote the use of equitable procurement.
- Maintain ePSU Marketplace for on-line purchase of goods.
- Facilitate compliance with Federal Uniform Guidance for Federal Awards.

Contracting & Procurement Services Team



Signature Authority

- ***All goods and services agreements must be sent to Contracting and Procurement Services for signature.***
- The authority to sign agreements on behalf of the University is very limited.
- Faculty and staff outside of Contracting and Procurement Services do not have authority to sign agreements for Goods and Services.
- Avoid signing contracts, agreements and other vendor provided documents unless you have been authorized.

PSU's Signature Authority and Delegation may be found at:
www.pdx.edu/policies/adopted-policies

Solicitation Thresholds

Non-Federal funds

- \$25,000 or less: Direct Procurement – No solicitation process required
- \$25,001 - \$150,000: Informal solicitation process required - Request for Quote (RFQ)
- \$150,001 and greater: Formal solicitation process required - Request for Proposal (RFP)

Federal funds

- \$10,000 or less: Direct Procurement – No solicitation process required
- \$10,001 - \$150,000: Informal solicitation process required - Request for Quote (RFQ)
- \$150,001 and greater: Formal solicitation process required - Request for Proposal (RFP)

Methods of Procurement

(subject to Solicitation Thresholds)

Direct Procurement. Departments may negotiate directly with a single vendor and issue a purchase order or enter into a contract without obtaining quotes from other vendors. No competitive solicitation process is required. Purchase orders may be issued for goods; a contract is not required. A Personal Services Contract (PSC) or Personal Services Invoice (PSI) is ALWAYS required for services. Multiple purchase orders may not be issued separately with the intent to circumvent these Procurement Rules.

Request for Quote (RFQ). The Request for Quote (RFQ) is an informal competitive solicitation process. With the department's assistance, CAPS will draft the required RFQ solicitation document and post to the Oregon Procurement Information Network (ORPIN) for a minimum of three business days. If the contract awarded under the RFQ is for goods, the department must enter a purchase order into Banner. The text field of the purchase order must reference the PSU contract number. Contact CAPS with any questions regarding RFQ's, including development of RFQ's and posting on the ORPIN website.

Request for Proposal (RFP). The Request for Proposal (RFP) is a formal competitive solicitation process. With the department's assistance, CAPS will draft the required RFP solicitation document and post to the Oregon Procurement Information Network (ORPIN). The formal competitive solicitation process will be conducted in accordance with PSU Standard 580-61 (0000 through 0160). There may be additional considerations specific to the types of products and services being procured, so please contact CAPS early in the process for assistance in developing the appropriate solicitation document. Contact CAPS for any questions you may have about the RFQ or RFP process. The formal procurement process can take eight weeks or more to complete depending on the products or services being procured, so please plan ahead and contact CAPS early in the process.

Contracting for Personal Services

- Professional services are **creative or technical services** such as architect, consultant, trainer, programming, etc.
- Plumbing, landscaping and electrical are considered **trade services** and are not allowed on a PSI or PSC.
- Selection based on qualifications, reputation, certifications, etc. (not lowest cost).
- Must meet IRS requirements of an **independent contractor**.
- Cannot be current **PSU employee** (or former in same calendar year)
- **Under \$5,000** a **Personal Services Invoice** can be used
 - One time payment, services within 3 weeks, no Non-Resident Aliens, submitted directly to Accounts Payable,
- **Over \$5,000** a **Personal Services Contract (PSC)** is used
 - Multiple payments, services not within 3 weeks, used for Non-Resident Aliens.
- **Over \$25,000** a competitive process, RFQ or RFP, is required.

Ethical Considerations

- All PSU staff and faculty are public officials and subject to ORS 244.
- Avoid any conflicts of interest
 - Financial interest in a company
 - Doing business with a “family member,” which is broadly defined
- Avoid the appearance of impropriety or favoritism
- Stay within the gift guidelines – Generally \$50
 - Avoid personal gain

When to Contact Us

- ✓ *If you have questions about a current purchasing or contracting need (friendly advice).*
- ✓ *If you need assistance with or have questions about ePSU Marketplace.*
- ✓ *If a purchase is over \$25,000 (or might be).*
- ✓ *If you need a contract* signed.*
- ✓ *If you need a PO in Banner approved.*
- ✓ *If you have a vendor performance issue.*
- ✓ *If you get contacted by a vendor and you are unsure they are legitimate (scams).*

**If it contains terms or requires a signature, it's a contract.*

CAPS - Contact Information

General Inquires for Goods & Services Team - contract@pdx.edu

General Inquires for Construction Team - contracting@pdx.edu

GOODS AND SERVICES TEAM

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ADMINISTRATION

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