



## Office of Contracting and Procurement Services

### **SFO DELEGATED CONTRACT PROCEDURE EFFECTIVE: FEBRUARY 5, 2020**

Contracting and Procurement Services (CAPS) has received approval for the Signature Authority & Delegation Policy (<https://www.pdx.edu/policies/adopted-policies>) to be amended to authorize individuals who are Senior Fiscal Officers, as defined below, to sign the specific contract documents, as defined below.

#### **Senior Fiscal Officer (SFO):**

College, school or department administrative person who has primary responsibility for budget and financial leadership, decisions and control and is designated as an SFO by Human Resources.

#### **Delegated Contracts:**

Written agreements for Catering, Events, Hotels and Resorts, and Bus Charters with a dollar value of \$10,000 or less. Delegated Contracts may be reviewed and signed by the designated SFO of a college, school or department. Contracts are defined as follows:

**Catering** – contracts for the provision of food and drink at a PSU sponsored event taking place on the PSU campus or at an offsite location. Outside catering may not be used in campus locations that are subject to the exclusivity provisions of a PSU food services contract.

**Events** - contracts for speakers, performers, meals, equipment, tables and chairs at a PSU sponsored gathering taking place on the PSU campus or at an offsite location.

**Hotels and Resorts** – contracts for lodging, conferences and food at hotels or resorts.

**Bus Charters** – contracts for PSU group transportation by exclusive use of a bus or buses at a fixed rate, under one contract and for a specified itinerary.

#### **PSCS ARE NOT INCLUDED IN THIS DELEGATION**

#### **INTERNATIONAL CONTRACTS\* OF ANY KIND ARE NOT INCLUDED IN THIS DELEGATION**

**\* Contracts with Non-resident alien (NRA) or Foreign entity – public or private – and (federally recognized) Indian Tribes.**

#### **No Delegation by SFOs:**

SFOs may not delegate their signature authority under any circumstances.

#### **Interim SFOs:**

Interim SFO have signature authority for the period that they are designated an Interim SFO by Human Resources.

#### **Revocation of Delegation:**

At their discretion, the Associate Vice President, Risk Management and Contracting, or the Director of the Office of Contracting and Procurement Services may revoke the delegated signature authority of any SFO who fails to comply with the requirements of this Procedure or exceeds the scope of the delegation.

**SFO Training:**

CAPS will train all SFOs on contract review before SFOs commence review and execution of Delegated Contracts. The initial training took place at the regularly scheduled SFO monthly meeting on February 5, 2020.

New SFOs will be trained as needed. It is the responsibility of the college, school or department to notify CAPS when there is a new SFO. New SFOs must NOT sign Delegated Contracts prior to receiving training.

**Delegated Contract Review and Execution:**

After receiving training, SFOs will:

Review Delegated Contracts and markup as required by the Delegated Contract Review Checklist (Attached).

Initial changes, sign Delegated Contract and return it to vendor for signature or for their file if already signed by vendor.

If the vendor does not initially agree to change(s), SFOs will proceed in the following order:

- (1) Attempt to negotiate with vendor.
- (2) Contact CAPS for advice on how to negotiate change.
- (3) Refer contract/vendor to CAPS for further negotiation.

**Certificates of Insurance:**

If a Certificate of Insurance (COI) is required, SFOs will submit a request for COI to Don Johansen in Risk Management at [johansed@pdx.edu](mailto:johansed@pdx.edu) as set forth in the COI Request Process (Attached).

**Delegated Contracts Provided to CAPS/iContracts:**

Once a Delegated Contract is fully signed, SFOs will email a copy to [contract@pdx.edu](mailto:contract@pdx.edu). CAPS will set up an iContracts record for each SFO by name. CAPS will upload fully signed Delegated Contracts to the applicable iContracts record.

**Payment of Invoices:**

A fully executed contract must be in iContracts before Accounting can pay any invoice.

**Audits:**

CAPS will conduct periodic audits to confirm appropriate contract review and markup have been performed.

**Attachments:**

Delegated Contract Review Checklist  
Certificate of Insurance Request Process