

## FAP SHORTCUT TO CONSULTANT AND CONTRACTING RULES & POLICIES

*FAP goal is to strive for "fairness, a high quality of services, and to encourage excellence and costs consciousness"*

### ARCHITECTS, ENGINEERS, PLANNERS, CONSULTANTS OAR 580-050-0020

Up to \$75,000	Anticipated fee <u>including</u> consultant fees, reimbursable expenses, and amendments don't exceed \$75k, any qualified consultant may be selected (retainer or stand-alone FAP agreement)
\$75,001 – \$200,000	Anticipated fee including consultant fees, reimbursable expenses, and amendments don't exceed \$200k, any consultant on RETAINER or 3 proposals from consultants not Retainer are acceptable
\$200,001 and up	Advertise RFQ/RFP (formal solicitation) at least 3 consultants (unless deemed emergency)
DOJ approval required	Consultant Services \$75,000 and over; this includes all amendments OAR 137-045-0030

### CONTRACTORS OAR 580-050-0032

Up to \$5,000	Any qualified contractor licensed to do business in Oregon
\$5,000 - \$25,000	Solicit two bids (contractor must be licensed to do business in Oregon)
\$25,001 - \$500,000	Bids from 2 contractors on RETAINER or 3 bids from contractors not on retainer
\$500,000 and over	Formal bids from minimum of 3 contractors (note: use OUS Agreement form, not a supplement)
DOJ approval required	Projects over \$3 million, and projects that aren't processed with Standard OUS Forms

### BOLI PREVAILING WAGE RATES ARE REQUIRED FOR ALL PROJECTS

OVER \$50,000: If project is under \$50k initially & then exceeds \$50k, it then becomes subject to BOLI (retroactive).

**PERFORMANCE & PAYMENT BONDS: Any construction project with construction costs over \$50,000 requires a Performance & Payment Bond. Projects under \$50,000 will need approval by either Ken Irwin or Nancy Grech, and Robyn. Include approvals before going to Contracts.**

Affirmative Action is required for projects \$25,000 and over.

**1% FOR ART**

**Projects w/direct construction exceeding \$100,000 must budget amount equal to 1% of the direct construction costs for purchase of artwork. Exception is a project with 75% or more of the project costs that is mechanical.**

**FURNITURE & PURCHASE ORDERS: > \$5,000 one vendor**

**\$5,000 - \$50,000 informal procurement with minimum of 3 bids**

**\$50,000 formal process—BUSINESS OFFICE PROCUREMENT NOT FAP**

**note: do not use a purchase order for a contractor that is on OUS Retainer**

**IF FURNITURE PURCHASE INCLUDES INSTALLATION OR IS A PART OF A PROJECT OVER \$50,000, IT IS A BOLI PREVAILING WAGE RATE PROJECT**

**When purchasing goods from a State Contract (Orpin) we are exempt from formal solicitation and DOJ review as this process has already been taken care of**

### **PROJECT COORDINATORS:**

**ALL REQUESTS MUST INCLUDE A COMPLETED "CONTRACT REQUEST FORM" (A BROWNIE) which is a brown ½ sheet) WITH APPROPRIATE APPROVALS, PROJECT NUMBER, BOND WAIVER APPROVAL IF UNDER \$50,000.**

**Please note that these will be updated by end of March 2006**

- **Note: If a contract or PO is on a maintenance project or is for routine supplies, ROBYN'S SIGNATURE IS REQUIRED. THESE PROJECTS ARE: A1, D1, F1, M1 & P8**
- **IF PROJECT IS A RECHARGE, DM OR CONSTRUCTION PROJECT WITH AN APPROVED BUDGET, ROBYN'S SIGNATURE IS NOT REQUIRED. The Project Manager must approve the request before order is placed. THESE PROJECTS ARE: A2, D2, D3, C1, F2, M2, P9 and R2**

**PO's for stores inventory do not need to be approved by Robyn.**

**PURCHASE ORDERS CAN BE PROCESSED IN FACILITIES FOR MATERIALS & GOODS UP TO \$50,000; IF MORE THAN \$50K THEY GO TO BUSINESS OFFICE**

### **BUSINESS OFFICE POLICIES FOR GOODS & MATERIALS (more detailed information)**

**BAO Goods/Materials**

#### **10.018 ORDERS COSTING UP TO \$5,000 - One Vendor**

When the amount of the purchase contract does not exceed \$5,000, the department may enter into a contract with one vendor without the necessity of contacting other vendors for quotes. Entering a purchase order for less than \$5,000 into the FIS system is optional, unless required by the vendor.

#### **10.019 ORDERS COSTING \$5,000 TO \$50,000 - Informal Procurement Process**

Departments may use the Informal Procurement Process for all purchases of supplies, equipment, and trade services where the estimated cost exceeds \$5,000 but does not exceed \$50,000, and where the department chooses not to follow the Formal Process (explained below). The Informal Process may also be used for any procurement, regardless of the estimated cost, if use of the informal procurement will not interfere with competition among prospective contractors, reduce the quality of services, or increase costs.

- a. The Informal Process is the solicitation of a minimum of three competitive quotes. Solicitation may be accomplished by advertisement or by making a request for vendors to make an offer. Written, oral, or electronic quotes may be solicited. A vendor declining to quote counts as one of the required quotes.

- b. A clearly documented record must be kept showing the sources contacted, amounts of the quotes received, basis for selection, and other pertinent information to the solicitation. If three vendors were not reasonably available, the justification for soliciting fewer vendors shall be documented in a text field in the FIS Purchase Order. Other written documentation relating to the purchase must be retained in the department.
- c. When procuring goods or services through the solicitation process, information regarding vendors contacted, basis for selection, prices of various vendors and other information pertinent to the solicitation must be clearly documented. If three vendors are not reasonably available, the justification for soliciting fewer vendors shall be documented.
- d. When procuring supplies, equipment and services through an emergency process, the designation of such emergency may only be authorized by an institution president or chief financial officer. The procurement process to be used will be at the discretion of authorized personnel, but must be documented. Such documentation must justify the use of such emergency process.