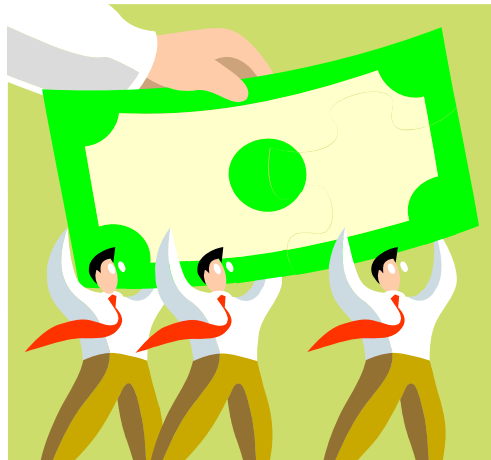




Doing Business with OSU

OSU Procurement and Contract Services (PaCS) welcomes positive interaction with vendors. This brochure is designed to give information to vendors about how we do business. Our mission is to provide the highest level of service to the University departments in their purchasing and contracts needs. We like to work with vendors to meet these needs in the easiest and quickest way possible.



Procurement and Contract Services (PaCS)

Oregon State University

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WHO WE ARE	Page 1	
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Frequently Asked Questions



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1. What is "delegated authority" and what is my responsibility in accepting orders?



Currently OSU departments have delegated authority to purchase up to \$5000* without prior PaCS approval. Anything that is \$5000 or more needs to route through PaCS first. We will then obtain bids and issue a purchase order.

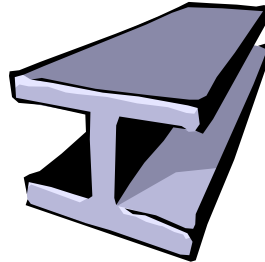
**This is \$5000 for the total of the order, not per line item. This delegation of authority does not apply to Design-related procurements.*

A vendor should not accept any order that is \$5000 or more from an OSU department unless prior authorization from PaCS has been made. Firms who do so accept the risk of delayed payment or the voiding of the unauthorized contract. If you are in doubt about an order that is \$5000 or more placed by a campus department please contact us.

2. What types of procurement bids does OSU do?

Vendors may be asked to submit bids on either a formal or an informal basis. Informal bid solicitations may be obtained by telephone, fax, email or mail and are for goods or services valued up to \$50,000.00. Formal bid solicitations (called Invitation to Bid) are used for orders \$50,000 and more, as well as some under \$50,000 (Buyer discretion) for goods and services. These bids are also required to be advertised. A contract is then awarded to the lowest responsible bidder. Another type of formal bid solicitation is a Request for Proposal (RFP). An RFP is used when OSU wants to consider alternative ways to meet its goal. The resulting contract is awarded based upon a variety of evaluation factors and not necessarily upon the lowest bid price.

3. What is the process for Construction Contracting?



There are several procedures and rules which must be followed when doing a construction contract. See General Guidelines - Construction Projects, page 9.

4. How do I find out about current OSU procurement bids?

Bids that have an estimated value of \$50,000+ are advertised on our Web page at www.PaCS.oregonstate.edu Under Vendor Services on our home page, click on "Open and Advertised Procurements." We encourage vendors to frequently check our Web page to learn about bidding opportunities. We also advertise our large bid packages in the Daily Journal of Commerce and through the State of Oregon's Vendor Information Program (VIP).

5. How do I know if there have been changes to a bid?

It is your responsibility to check the OSU PaCS web page or contact OSU PaCS up until the bid closing time to see if any bid addendums have been issued. It is very important that you address issues brought forth in any addendum to ensure that your bid is accepted.



6. How do I get on OSU's bidder list?

We do not maintain bidder lists, per se. However, we do list vendors that participate in our annual Merchant Expo on our PaCS webpage. We issue our bids through our web page and you should frequently check it for new bidding opportunities.

7. What if I have worked with an end user upfront on a project and OSU PaCS still issues a bid?

Working with an end user or department, including consulting, special design and other services, does not guarantee award of a contract to you. This is a risk that you take in doing this. Other potential bidders will be sought by completing a competitive bid process, per legislative mandates.



8. How can I find out about current OSU contracts?

OSU PaCS awards and maintains contracts for various commodities for use by OSU and the Oregon University System (OUS). Please check our Web page for a list of contracts currently in effect.

9. What if I am an Emerging Small, Minority, Women-owned business or Qualified Rehabilitation Facility?

Please let us know. We do report our purchases with Small, Disadvantaged, Women-owned businesses and Qualified Rehabilitation Facilities and we make every effort to provide opportunities to these vendors. We do have State database links on our Web page for information when seeking these sources. You should also



frequently check our webpage for bidding opportunities.

10. Where do I send my invoices?

Invoices should be sent directly to the campus department that placed the order. Please be sure to include the department's name and purchase order number, index number, or procurement card number that the department used to place the order, on your invoices. This makes it easier to match invoices with purchase orders, resulting in quicker payment. Questions regarding payment should be directed to the ordering department or to Accounts Payable, (541) 737-4262.



11. Who can sign my Contract?

If you have a document that you are asking OSU to sign in order for you to do business with us (e.g. credit application, Tax ID form, etc.), that document needs to be signed by an authorized Contracts Officer for OSU. There are very few folks at OSU who are designated as Contracts Officers. You should make sure that your document is signed by a Contracts Officer (almost always by someone in PaCS) or you may run into difficulty in getting payment.



12. What's the difference between a Personal/Professional Services Contract and a Purchase Order?

It really is a function of the type of service you are providing to OSU. Most trade-related services are procured using a Purchase Order when for more than \$5000. For total projects under \$5000 (not by fragmenting or splitting invoices), you can provide trade-related services to OSU and just invoice the department and get paid. If you are providing a professional service to OSU, you will need to at least complete a Personal Services Invoice. When they exceed \$5000 you should work with your client to have them process a Personal/Professional Services Contract, before you do the work, through PaCS for approval. There are sometimes gray areas on which direction to go and then the OSU department should contact and send through PaCS for correct determination and processing.

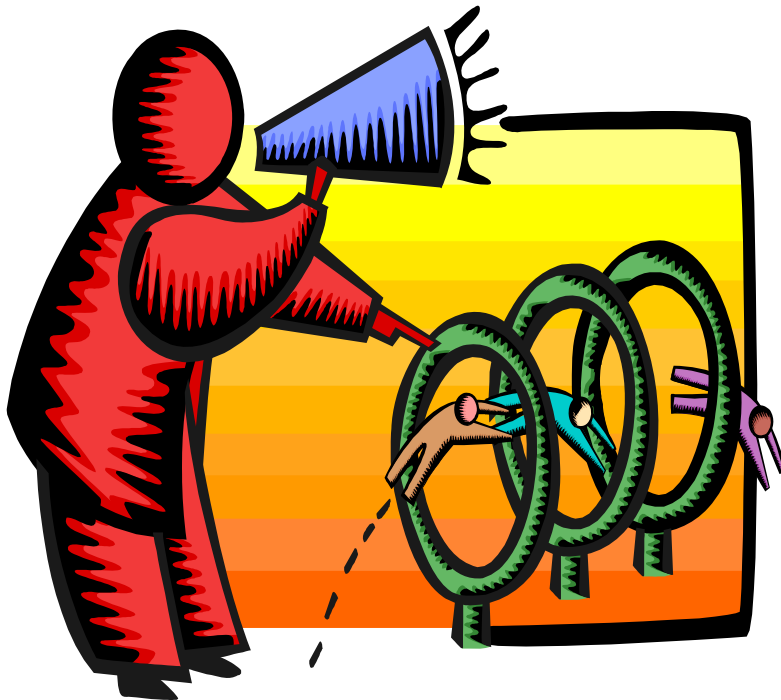
13. Where can I get additional information or clarification?

Please contact us at:

Oregon State University
Procurement and Contract Services (PaCS)
644 SW 13th Street
Corvallis, OR 97333

Phone: (541) 737-4261

Fax: (541) 737-2170



E-mail: PaCS@oregonstate.edu

14. CONSTRUCTION PROJECTS

1. Authorizations Required:
 - a. Remodel/renovation projects with total budgets of over \$500,000 require President's Cabinet, Board of Higher Education, and Legislative approval.
 - b. Repair projects do not require legislative authorization unless the total project budget exceeds \$1,000,000, then must follow the same process as in (a) above.
2. Affirmative Action
 - a. All remodel/renovation projects over \$50K require affirmative action goals unless the contract is going to be for a single trade (HVAC, Electrical, etc.).
 - b. Repair projects under \$100K do not require affirmative action goals.
3. Contracting Authority, OAR 580-050-032
 - a. Projects with a direct contract cost of less than \$25,000 should be processed through OSU general purchasing procedures at PaCS. If the estimated cost is close to \$25K (say \$23K or up), you have the option of going through "OUS Facilities" contracting procedures at PaCS. If the bids come in over \$25K, and you have gone through normal purchasing procedures, you need to re-do the process to go through the Facilities process, so it may save some time to go through the Facilities process first.



CONSTRUCTION PROJECTS (cont.)

4. Oregon Prevailing Wage Law
 - a. Projects with a total “contracted cost” of more than \$50,000 are subject to BOLI Prevailing Wage Law. This includes both labor and materials or equipment purchased specifically for the project.
 - b. If the Project Manager or the client elects to issue separate purchase orders for the performance of a project, even though the individual purchase order may be less than \$50,000, BOLI law still applies.



PLEASE NOTE: Any purchase, regardless of dollar amount, that is part of a larger BOLI/PWR project must also be processed through PaCS.

CONSTRUCTION PROJECTS (cont.)

5. Retainer Contracts

- a. Construction projects with a direct construction cost of between \$25,000 and \$500,000 may be performed using the “Retainer” process. In no case can the cost of these projects exceed the \$500,000 limit identified in OAR 580-050-032.

6. Funding

- a. Before any contract or change order can be signed on behalf of the Board of Higher Education, funding in an amount adequate to cover the cost of the contract must be in place through Facilities Services.

7. Payments

- a. All payments for design or project management services must be processed through Facilities Services.
- b. All payments for construction services contracted through Facilities Services must be processed through Facilities Services. On-site project manager will be provided a copy of the pay request (via FAX) for approval prior to processing of payment.

15. CONSULTANTS

1. Authorizations Required

- a. The only individuals on campus (except the President) legally authorized to execute a design-related contract are those contract officers listed in the August 20, 2007 memo from Mark McCambridge (OAR 580-50-020).



2. Cost Limits

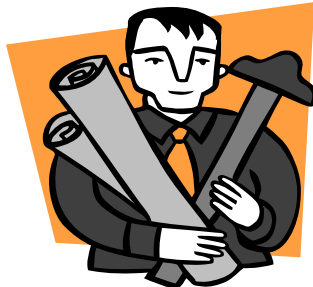
- a. Projects with a total expected design cost of less than \$75,000 may be awarded to any firm deemed capable of performing the work. No formal selection process is required. The consultant need not be on the retainer list. In no case may the design work performed by the selected designer exceed \$75,000.
- b. Projects with a total expected design cost of between \$75,000 and \$200,000 may either be assigned to any firm on the retainer list or proposals may be requested from any three firms, whether on the retainer list or not. Award may be made to the firm deemed most able to perform the work. In no case may the cost of the design work performed by the selected designer exceed \$200,000.

CONSULTANTS (cont.)

- c. Projects with a total expected design cost in excess of \$100,000 must go through the “formal” selection process, as outlined in OAR 580-050-020.

3. Proposal Content

- a. Proposals from A/E firms must contain:
 1. a complete description of services to be performed, including a list of all deliverables;
 2. a maximum not-to-exceed figure for services, and a maximum not-to-exceed figure for reimbursable expenses; and
 3. a listing of hourly rates (if not on the OUS retainer list) and staff members who will be assigned to the project.



NOTES