

Multnomah Education Service District

Code: **DJ/DJC AR(3)**
 Adopted: 11/16/10
 Revised/Reviewed: 4/07/14

Purchasing Procedures - Contracts

CONTRACT TYPES, ELEMENTS, THRESHOLDS, RESPONSIBILITIES AND OVERSIGHT OF PROCESSES

Required Contract Elements (Formation, Selection & Administration)	Responsibility to Do, Get, or Establish Required Contract Elements	Procured Contract Types (where MESD pays to receive goods and/or services)														
		Employment		Personal Services			Goods & Services			Spec. Circumstances			Other Types Specified by Law			
		Oversight: HR		Oversight: HR			Oversight: Bus. Svcs.			Oversight: Adm.			Oversight: Admin.			
		Permanent	Limited-Term	small	Intermediate	large	small	Intermediate	large	NA	Sole source	Emergency	Real Estate: Purchase, Lease or Rental	Architect, Engineer or Surveyor	Public Improvement	
\$ Thresholds	State Law & Dist. Policy	NA	NA	Less than \$10 K	Between \$10 K & \$150 K	Over \$150 K	Less than \$10 K	Between \$10 K & \$150 K	Over \$150 K	NA	NA	NA	NA	Dir. Appt. under \$50K, RFP over \$50K	Over \$50K requires BOLI Prevailing Wage	
Time Limits	State Law, Dist. Policy & Labor Agmts.	perm.	up to 96d OEA, 150d AFSCME or agmt.	less than 1 year	up to 3 years	up to 3 years	up to 5 years	up to 5 years	up to 5 years	up to policy limit	by policy	by policy	As negotiated	duration of project	duration of project	
Policy	Legal	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Template	Legal	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Initiation	Contract Mgr.	✓	✓	✓	✓	✓	NA	✓	✓	✓	✓	✓	✓	✓	✓	
Pub. Notice	Dept.	by policy	by policy	NA	✓	✓	NA	NA	✓	NA	✓	✓	by law	by law	by law	
Screening or Solicitation	Dept.	competitive	competitive	Dept. discretion	RFP (informal)	RFP (formal)	Dept. discretion	RFQ (3 quotes or better)	ITB (formal)	NA	legal justification & public notice	declaration by Board or Supt	negotiation	competition or direct appt. as per law	competition as per law	
Interviews	Dept.	✓	✓	NA	Per RFP terms	Per RFP terms	NA	NA	NA	NA	NA	NA	NA	per law	NA	
Selection or Award, including publication of intent to Award, when required by law.	Dept.	✓	✓	NA	Per RFP terms	Per RFP terms	NA	Lowest responsible responsive quote	Lowest responsible responsive bid	NA	per legal justification & public notice	per terms of Emcy. Declaration	✓	✓	✓	
Final Approval	Legal	✓	✓	✓	✓	✓	NA	✓	✓	✓	✓	✓	✓	✓	✓	
Signatures	Dept.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Cert. of Insurance Solicitation & Verification	Dept.	NA	NA	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Receipt of Svcs or Goods	Dept.	Flow of services, Receipt of goods or occupancy only after all steps above this level and all elements are in place.														
Administration of Contract	Dept.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Payments	Bus.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Monitoring	Contract Mgr.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Tracking	TS (FAS)	✓	✓	✓	✓	✓	NA	✓	✓	✓	✓	✓	✓	✓	✓	
Retention	TS	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	