

Policy Title:	Campus Contracting & Purchasing Signature Authority
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Governing Body:	Southern Oregon University	Policy Number:	FAD.078
Policy Contact:	Director of Business Services	Date Revised:	March 2020
Custodial Office:	Finance & Administration	Date Approved:	May 7, 2020
Approved By:	President	Next Review:	May 2022
Related Policy:	Procurement and Contracting Code (FAD.057)		

Revision History

Revision Number:	Change:	Date:
1	Transfer to new format	February 2018
2	Update for position reorganizations	May 2019
3	Update for additional delegated authorities	May 2020

A. Purpose:

To define the delegated authority required to initiate contracts between Southern Oregon University and outside vendors and agencies. Also, to define the delegated authority to establish internal Memoranda of Understanding.

B. Definitions:

- MOU = Memorandum of Understanding.

C. Policy Statement:

The following tables define:

- Type of action or agreement.
- Dollar limitations on signing authority.
- Individuals being granted signing authority.

Purchasing Supplies and Materials

Contract Type	Dollar Amount	Signature Requirements
Purchasing Supplies and Materials, and Purchase Orders (See exception for Departmental Procurement Cards below).	<= \$25,000	Division/Department Directors/Managers <ul style="list-style-type: none"> Further delegation can be extended to additional staff, through the Service Center, if approved by the individual noted above AND also approved by their Vice President.
	>= \$25,000 but < \$500,000	Director of Business Services (or designee) or VP for Finance and Administration.
	>= \$500,000	VP for Finance and Administration with approval of the Board of Trustees.
Facilities Management and Planning Purchases	<= \$100,000	Director of Facilities Management and Planning or VP for Finance and Administration.
	> \$100,000 but < \$500,000	Director of Facilities Management and Planning AND either Director of Business Services (or designee) or VP for Finance and Administration.
	>= \$500,000	VP for Finance and Administration with approval of the Board of Trustees.
Stevenson Union (ASSOU and Facility)	<= \$100,000	VP for Enrollment Management and Student Affairs.
	> \$100,000 but < \$500,000	VP for Enrollment Management and Student Affairs AND either Director of Business Services (or designee) or VP for Finance and Administration.
	>= \$500,000	VP for Finance and Administration with approval of the Board of Trustees.
Housing Purchases & Conferences	<= \$100,000	Director of Housing.
	> \$100,000 but < \$500,000	Director of Housing AND either Director of Business Services (or designee) or VP for Finance and Administration.
	>= \$500,000	VP for Finance and Administration with approval of the Board of Trustees.

Purchasing Supplies & Materials (continued):

Contract Type	Dollar Amount	Signature Requirements
Library Book Purchases	<= \$100,000	University Librarian.
	> \$100,000 but < \$500,000	University Librarian AND either Director of Business Services (or designee) or VP for Finance and Administration.
	>= \$500,000	VP for Finance and Administration with approval of the Board of Trustees.
Information Technology and Telecommunication Purchases	<= \$100,000	Chief Information Officer.
	> \$100,000 but < \$500,000	Chief Information Officer AND either Director of Business Services (or designee) or VP for Finance and Administration.
	>= \$500,000	VP for Finance and Administration with approval of the Board of Trustees.

Departmental Procurement Cards

Contract Type	Dollar Amount	Signature Requirements
All Campus Departments or Divisions with established SOU Procurement Cards (P-Card)	< \$5,000 Single Purchase <= \$10,000 Card Limit	Department staff as approved by: <ul style="list-style-type: none"> • The card's Budget Authority AND • The Service Center (verification) <ul style="list-style-type: none"> - Verification for being authorized users for the P-Cards in their respective department (i.e., appropriate approvals in place and individual has passed the on-line test).
	>= \$5,000 Single Purchase and/or > \$10,000 Card Limit	Same as above, once approved by the Director of Business Services.

Construction/Capital Improvement/Architect/Engineering Contracts (*)

Contract Type	Dollar Amount	Signature Requirements
All campus	< \$25,000	Director of Facilities Management and Planning.
	>= \$25,000 but < \$100,000	Director of Facilities Management and Planning AND either Director of Business Services or VP for Finance and Administration.
	>= \$100,000 but < \$500,000	VP for Finance and Administration.
	>= \$500,000	VP for Finance and Administration with approval of the Board of Trustees.
(*) Legal coordination and vetting through Contracts Administrator is required.		

All SOU Retainer Agreements and BOLI reporting must be coordinated through the Office of Facilities Management and Planning (FMP)

Facility Use Agreements (Subject to Policy for Use of University Facilities dated 2/14/03)

Contract Type	Dollar Amount	Signature Requirements
All campus	< \$25,000	Department/Division Director AND Contracts Administrator.
	>= \$25,000 but < \$500,000	Contracts Administrator, Director of Business Services, or VP for Finance and Administration.
	>= \$500,000	VP for Finance and Administration with approval of the Board of Trustees.

Grant and Sponsored Programs Contracts (All federal funding and non-federal with conditional use/timelines)

Contract Type	Dollar Amount	Signature Requirements
Proposals	No \$ limit	VP for Finance and Administration (or designee). (*)
Final Award Contract (with pre-approved proposal)	No \$ limit	VP for Finance and Administration (or designee). (*)
(*) Legal coordination and vetting through Contracts Administrator (who may also be delegated signature authority) is required.		

Information Technology Contracts (*)

Contract Type	Dollar Amount	Signature Requirements
All Contracts	<= \$100,000	Chief Information Officer.
	> \$100,000 but < \$500,000	Chief Information Officer AND either Director of Business Services (or designee) or VP for Finance and Administration.
	>= \$500,000	VP for Finance and Administration with approval of the Board of Trustees.
(*) Legal coordination and vetting through Contracts Administrator is required.		

Personal Services Contracts

Contract Type	Dollar Amount	Signature Requirements
All Departments and Divisions	< \$25,000	Department/Division Director (or designee) AND Service Center Associate Director (or Contracts Administrator).
	>= \$25,000 but < \$100,000	Department/Division Director AND either Director of Business Services or VP for Finance and Administration.
	>= \$100,000 but < \$500,000	VP for Finance and Administration.
	>= \$500,000	VP for Finance and Administration with approval of the Board of Trustees.

Employee Reimbursements

Contract Type	Dollar Amount	Signature Requirements
All Departments and Divisions	< \$25,000	Department/Division Director (or designee)
	>= \$25,000	Department/Division Director AND respective Dept/Division VP

All Other Contracts (Agreements and Memoranda of Understanding)

Contract Type	Dollar Amount	Signature Requirements
All Departments and Divisions	< \$25,000	Department/Division Director (or designee) AND Contracts Administrator.
All Departments and Divisions	>= \$25,000 but < \$100,000	Department/Division Director AND Director of Business Services.
All Departments and Divisions outside of Academic Affairs	>= \$100,000 but < \$500,000	Department/Division Director AND either Director of Business Services or VP for Finance and Administration.
All Divisions within Academic Affairs	>= \$100,000 but < \$500,000	Department/Division Director AND either Director of Business Services or VP for Finance and Administration AND Provost.
All	>= \$500,000	VP for Finance and Administration with approval of the Board of Trustees.

Any department electing to establish a “designee” beyond the Department/Division Director, or other position specifically referenced in this document, must formally acknowledge the person filling the “designee” role by completing a “Delegation of Signature Authority” form for either supply purchases, contracts, or both, and this document must be on file with the Service Center.

All agreements, contracts and procurements requiring SOU to accept terms, conditions, or liabilities must be reviewed by the SOU Contracts Administrator prior to signature.

In accordance with institution policy, solicitation and final contract documents require SOU General Counsel review for all contracts with a total value exceeding \$100,000, and most government/public international or interstate agreements.

The individual who approves any transaction which constitutes a commitment between the university and a non-university party is responsible and accountable for ensuring that:

- He or she has the authority to approve the transaction or execute a contract.
- Where required, institutional review and approval has been obtained before any commitment is made.
- The transaction conforms to university policies.
- Funds for the transaction have been allocated or are otherwise available within regularly approved budgets, special appropriations, or restricted or designated accounts.
- There is no real or apparent conflict of interest on the part of the approving individual or any other individual or organization involved in the transaction.
- This policy is also subject to extended delegated purchasing authority during times where the campus has announced a state of emergency.
- All applicable procurement requirements set forth in FAD.057 and FAD.058 have been followed.

This policy may be revised at any time without notice. All revisions supersede prior policy and are effective immediately upon approval.

D. Policy Consultation:

The 2019 version of the policy was coordinated with Business Affairs Council, Enrollment Management and Student Affairs Council and Policy Council; it was posted on May 17, 2019 for community comment. The 2020 version reflects minor administrative changes and was coordinated with Business Affairs Council and Policy Council.

The Policy Contact, defined above, will write and maintain the procedures related to this policy and these procedures will be made available within the Custodial Office.