

**Effective:**

**09/12/ 2016**

Upon signature



# **DELEGATED SIGNATURE AUTHORITY FOR PURCHASING AND INITIATING CONTRACTS**

Defines the delegated authority required to initiate contracts between Southern Oregon University and outside vendors and agencies.

Document Source: SOU Finance and Administration

## Delegated Purchasing & Contract Signature Authority

Revision Date: September 12, 2016

CONTRACT TYPE

DOLLAR AMOUNT

SIGNATURE REQUIREMENTS

### Purchasing Supplies and Materials

Purchasing Supplies and Materials, and Purchase Orders (See exception for Departmental Procurement Cards below).	<= \$5,000	Division/Department Directors/Managers <ul style="list-style-type: none"> <li>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.</li> </ul>
	> \$5,000, but < \$25,000	Division/Department Directors
	>= \$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 Planning and Management, or VP for Finance and Administration.
	> \$100,000, but < \$500,000	Director of Facilities Planning and Management 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 Leadership	<= \$100,000	AVP for Enrollment and Retention
	> \$100,000, but < \$500,000	AVP for Enrollment and Retention 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.

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### Purchasing Supplies & Materials (continued):

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

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"> <li>• The card Budget Authority, AND</li> <li>• The Service Center (verification) <ul style="list-style-type: none"> <li>- 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)</li> </ul> </li> </ul>
	>= \$5,000 Single Purchase, and/or > \$10,000 Card Limit	Same as above, once approved by the Director of Business Services

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### Construction/Capital Improvement/Architect/Engineering Contracts\*

All campus	< \$25,000	Director of Facilities, Management and Planning
	>= \$25,000, but < \$100,000	Director of Facilities, Management and Planning AND 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.

\*All OUS Retainer Agreements and BOLI reporting must be coordinated through the Office Facilities Management and Planning (FMP)

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

All campus	< \$25k	Department/Division Director AND SOU Risk Coordinator (Fin & Admin)
	>= \$25,000, but < \$500,000	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)

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



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### CONTRACT TYPE

### DOLLAR AMOUNT

### SIGNATURE REQUIREMENTS

#### Information Technology Contracts

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.

#### Personal Services Contracts

All Departments and Divisions	< \$25,000	Department/Division Director AND Service Center Director
	>= \$25,000, but < \$100,000	Department/Division Director AND 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.

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### All Other Contracts (Agreements, and Memorandums of Understanding)

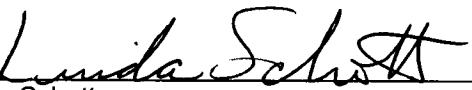
All Departments and Divisions	< \$100,000	Department/Division Director AND Director of Business Services
All Departments and Divisions outside of Academic and Student Affairs	>= \$100,000, but < \$500,000	Department/Division Director AND Director of Business Services, or VP for Finance and Administration.
All Divisions within Academic and Student Affairs	>= \$100,000, but < \$500,000	Department/Division Director AND 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.

In accordance with institution policy, solicitation and final contract documents require SOU General Counsel, review for all contracts with a total value exceeding \$100k, 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.

Approved:

  
 Linda Schott,  
 President

9/20/16  
 Date