

## **ADM-1.05 - Professional, Technical and Expert Services Contracting Manual**

### **PROFESSIONAL, TECHNICAL AND EXPERT SERVICES CONTRACTING MANUAL**

*Administrative Rule Adopted by Procurement Services Pursuant to Rule-Making Authority*

ARB-ADM-1.05

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[Link to Professional, Technical & Expert Services Contracting Manual](#) (PDF Document, 932 kb)

#### **INTRODUCTION**

The Bureau of Internal Business Services, Procurement Services Division is pleased to provide you with the Professional, Technical, and Expert (PTE) Services Contracting Manual (Manual). The City Council passed an ordinance on January 22, 2003 that required adherence to the processes and procedures identified within this Manual. Provisions within the Manual specifically address the Council's commitment to increased Minority, Women, and Emerging Small Business (M/W/ESB) opportunities, consistency in the contracting procedures and processes, accessibility to a one-stop information site for all consultants and potential PTE contracting opportunities, and providing for better tracking, monitoring data input and compliance. This Manual is published to assist City staff in developing and managing successful PTE procurements while maintaining the public procurement tenets of open competition and fairness to those we serve. PTE contracting continues to be the general responsibility of the individual City bureaus and offices. However, depending upon the amount, review of the solicitations as well as signing of the resulting contracts will be required and accomplished by the Chief Procurement Officer. The format has been changed based on bureau feedback and has better defined policies and procedures for procuring PTE services. The checklists continue to be included for each solicitation method. For the bureaus ease of use, we have provided standard forms and templates, which are available on Procurement Services website at [www.portlandonline.com/omf/purchasing](http://www.portlandonline.com/omf/purchasing).

By providing standardized checklists and outlining step-by-step solicitation methods, we are working to assure that PTE procurements are performed in a fair, consistent, effective and efficient manner as well as obtaining the necessary data required for M/W/ESB utilization. Additionally, potential consultants will be better able to quickly access information required for the various projects, respond to the various solicitations, and understand the rules and processes. The entire [Professional, Technical & Expert Services Contracting Manual](#)\* is available as a PDF Document.

\*Note: Document is in PDF format and requires the free [Adobe Acrobat Reader](#).

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#### **HISTORY**

Originally adopted by Bureau of Purchases and Office of the City Attorney April 2000 and filed for inclusion in PPD November 21, 2002.

Amended by Director of Bureau of Purchases February 2003 and filed for inclusion in PPD April 18, 2003.

Amended by Director of Bureau of Purchases July 2003 and filed for inclusion in PPD August 1, 2003.

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