

# ADM-1.05 - Contracting for Professional Technical and Expert Services Manual

## CONTRACTING FOR PROFESSIONAL TECHNICAL AND EXPERT SERVICES: A Manual for City Employees

*Administrative Rule Adopted by Bureau Pursuant to Rule-Making Authority*

ARB-ADM-1.05

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### INTRODUCTION

The Bureau of Purchases is pleased to provide you with the [July 2003 PTE manual](#)\* for your use. As you know, 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 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 Purchasing Agent. The format has been changed slightly to include sections for references, definitions, a Let's Get Started section that addresses the over-arching requirements that effect all procurement methods, and a separate stand alone section for each method of procurement. The checklists continue to be included for each solicitation method.

For the bureaus ease of use, we have provided the following standard forms and templates which are available on the Bureau of Purchases website at [www.portlandonline.com/omf/purchasing](http://www.portlandonline.com/omf/purchasing) :

- informal request for proposal (IRFP)
- request for qualifications, a two-step solicitation (RFQ)
- evaluators conflict of interest statement
- final payment form
- monthly utilization report
- PTE worksheet
- qualification based selection (QBS)
- formal request for proposal (RFP)
- contract amendment
- first tier disclosure form
- notice of intent to award
- sole source request form

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 [Contracting for Professional, Technical & Expert Services 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***

July 2003 version submitted for inclusion in PPD August 1, 2003.

### **Previous versions:**

Amended by Bureau of Purchases February 2003, submitted for inclusion in PPD April 18, 2003. Originally adopted by Bureau of Purchases and Office of the City Attorney April 2000 and submitted for inclusion in PPD November 21, 2002.