



## Finance and Accounting

obtaining needed supplies, equipment,  
and services,  
Provide for a cost effective procurement process,  
Ensure that all vendors and contractors are treated fairly and impartially,  
Provide quality service to Research Foundation users, and  
Support San José State University's educational mission;

### **2.0 Responsibility**

The Director of Finance and Accounting is responsible for the day to day administration of this policy. The administrative and fiscal responsibility for management of a sponsored project resides with the principal investigator(s) (PI) named on the award. The PI is responsible for ensuring that all expenditures and purchases associated with project accounts are made in compliance with the approved budget, the contract or grant terms and conditions, the Office of Sponsored Programs administrator, and Research Foundation policies.

The PI assists in the selection and purchase of goods and services by screening information regarding products, prices and supplies and solicit bids from vendors. The PI must maintain oversight to ensure that contractors perform in accordance with the terms, conditions,

## 4.0 Definitions

This table provides definitions for special terms, acronyms, and abbreviations used in this policy.

Term, Acronym, or Abbreviation	Description
Blanket Purchase Order	Used for small recurring purchases of goods from one vendor throughout the fiscal year.
Debarred	Excluded from doing business with the U.S. Government.
Equipment	<p>Tangible, non-consumable property (including information technology systems when applicable) meeting all of the following criteria:</p> <ol style="list-style-type: none"> <li>1. Unit acquisition cost of \$5,000 or greater (including all costs incurred to acquire and to ready the asset for its intended use such as purchase price, applicable tax, freight, etc.). Accessory items not meeting these criteria will not be capitalized.</li> <li>2. Estimated life of greater than one year,</li> <li>3. Not permanently attached to or incorporated in SJSU or Research Foundation buildings and grounds,</li> <li>4. Used to conduct Research Foundation business.</li> </ol> <p>For additional information refer to the Research Foundation Property Policy</p>

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Independent Contractor Agreement

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Principal Investigator (PI)

The individual who is primarily responsible for leading and directing the project. The PI is responsible for the overall conduct of



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of animal

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or less. Refer to the Research Foundation Procurement Card Procedure Manual for additional information.

**Direct Payment and Reimbursements:** Direct payment requests can be made when the amount of the purchase for goods and services is \$9,999 or less. A requisition for payment with an invoice from the vendor along with all appropriate supporting documentation should be submitted to the OSP analyst.

## **5.5 Competitive Bidding Requirements**

Effective July 1, 2023 the procurement thresholds and guidelines below apply to all purchases i

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The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation;

The federal awarding agency or pass-through entity expressly authorizes noncompetitive proposals in response to a written request from the nonfederal entity; or

After solicitation of a number of sources, competition is determined inadequate.

### **5.6 Debarment and Suspension: Executive Orders 12549 and 12689**

Vendors must not appear on the U.S. Government debarment list. The Research Foundation does not do business with vendors that have been debarred or suspended from doing business with the federal government.

Additionally, no contract shall be made





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## 7.0 Required Forms