



STATE OF WASHINGTON

OFFICE OF FINANCIAL MANAGEMENT

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July 3, 2001

OFM DIRECTIVE 01A-03

TO: Agency Directors, Policy Manual Holders, and Contract/Business Staff

FROM: Sadie Rodriguez-Hawkins, Assistant Director
Accounting Division

SUBJECT: REVISIONS TO CHAPTER 15 – PERSONAL SERVICE CONTRACTS

We are revising Chapter 15 of Washington's *State Administrative and Accounting Manual (SAAM)* issued by the Office of Financial Management (OFM). The effective date of these revisions is July 1, 2001. Please replace Policy 15.10, 15.20 and 15.30 in your manual with these revisions.

Chapter 15: Personal Service Contracts

Section 10 - General Policies for Acquiring Personal Services from Outside Consultants

<http://www.ofm.wa.gov/policy/15.10.htm>

This section of the policy has been updated as follows:

- Updated authority for the policies (Subsection 15.10.10).
- Provided more description on the definition of client services (Subsections 15.10.15 and 15.10.20.f).
- Updated the Department of Labor & Industries phone number for the Contracts Release Unit (Subsection 15.10.55).
- Added the e-mail address for the OFM Contract Office (Subsection 15.10.70).

Section 20 – Personal Service Contracts - Competitive Procurement Requirements

<http://www.ofm.wa.gov/policy/15.20.htm>

This section of the policy has been updated as follows:

- Revised the advertising requirement for competitive solicitations from a “statewide” daily newspaper to a “major” daily newspaper [Subsection 15.20.10.a.(2)].

- Clarified that an exception to advertising as part of a competitive solicitation in a daily newspaper in Washington State is allowed when services will be provided entirely out of the country [Subsection 15.20.10.a.(2)].
- Added a section on oral interviews as part of a competitive process [Subsection 15.20.10.a.(7)].
- Clarified that responses to an evidence of competition informal solicitation are to be submitted in writing and added electronic memoranda as an example of an informal solicitation document [Subsection 15.20.10.b.(1)].
- Added an exemption from advertising for sole source procurements when services will be provided entirely outside of Washington State or states contiguous to Washington State and when services will be provided entirely out of the country (Subsection 15.20.30.c).

Section 30 – Personal Service Contracts – Filing, Record Keeping and Reporting
(<http://www.ofm.wa.gov/policy/15.30.htm>)

This section of the policy has been updated as follows:

- Clarified that contract amendments that decrease the dollar amount of the contract are designated as “reviewed” by OFM, rather than processed as “informational” filings (Subsection 15.30.10.e).
- Added the web site for the electronic SF-110 filing form, the e-mail address for submission of electronic filings, and the mailing address for the OFM Contract Office for hard copy filings (Subsection 15.30.20). *NOTE: The OFM Contract Office will be moving in August 2001 so the new addresses are included.*
- Added “state” to fiscal year for sole source filing purposes (Subsection 15.30.30.a).
- Clarified employee training categories, and added further examples of purchased service training [Subsection 15.30.40.b (5)].
- Added that contracts filed after work has been completed will not be considered formally reviewed or approved by OFM. Rather such filings will be “acknowledged” as received and processed as late filings (Subsection 15.30.80.b).

All OFM directives and policies are available on OFM’s web site at <http://www.ofm.wa.gov/policies.htm>. We encourage you to use the on-line version of SAAM, as it includes all technical corrections made between formal policy updates which are published under directives. The superseded policies and additional resources are also available on OFM’s Administrative and Accounting Resources web site at: <http://www.ofm.wa.gov/policy/resource.htm>.

Questions regarding the changes to Chapter 15 should be directed to the OFM Contract Office by e-mailing us at ofm.contracting@ofm.wa.gov or by calling at (360) 664-7730 or (360) 664-7731 and after August 15, 2001, at (360) 725-5258 or (360) 725-5260.

Attachments

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