**When purchasing, what is considered a service?**

Due to a recent change in how UC is processing payments for contractual agreements and services, the following reference has been developed outlining the processes. Also included are examples of when a UC ANR unit may need to work directly with HR and their Business Partner before submitting the required document to UCD Purchasing.

**Criteria for a purchase to be considered a service.**

Anything that involves someone doing work or creating something on your behalf.

1. When a vendor requires access to a UC location in order to complete the work that you require.\*
2. When a vendor is required to handle or work on something that is owned by UC.\*\*
3. When the vendor’s function is also carried out by a UC represented position.

\*Does not include delivery of items, (flower, food, bottled water delivery)
\*\* Some exceptions apply, see below

**Purchasing Instructions**

1. For service-related purchases, complete the ANR Request for Contracting Out Services Form and send to MaryVlandis@ucanr.edu for review
2. Mary Vlandis may contact you for additional information if required.
3. When you receive approval from Mary, submit it along with a Purchase request form (with usual approval signatures) to your BOC Business Partner Team or REC point of contact.
4. A purchase order will be initiated per usual procurement process.

Note: In order to expedite your contracted service request timely and efficiently, each unit should follow these processes; any direct submission to the BOC and/or UCD without proper supporting documentation will result in delays.

Examples of purchases that are considered a service

1. **Anything that involves someone doing work or creating something on your behalf.**

|  |  |
| --- | --- |
| Landscaping repairs | Audio visual, recording, editing |
| ANR/program logo wear embroidery  | Forestry  |
| Translation  | Farming & fishing  |
| Sign language interpreting  | Audio visual, recording, editing |
| Website design | Transcribing  |
| Security/fire monitoring  | Art and graphic design |
| Legal expertise | Consultants |
| Soil and other sample analysis | Billboard advertising |
| Photography – aerial, still, studio | Education & training  |
| Coaching, workshop | Engraving/signage |

1. **When a vendor requires access to a UC location in order to complete the work that you require.**

|  |  |
| --- | --- |
| Pest Control | Horseshoeing |
| Custodial  | Veterinary care |
| Copier repair/maintenance | DJ or performer |
| Landscaping | Locksmiths |
| Building maintenance (plumbing, electrical, HVAC, painters, etc.) | Professional speakers where there is a set fee established (does not include honorariums for academic presentations, 4H judges etc.) |
| On-site repairs  | Caterer who is serving food/drinks during an event |
| Harvesting – field crops, fruit/nut trees | Farm hands |
| Soil and other sample analysis | Locksmith |
| Calibration of instruments | Animal control and welfare |
| Animal disease control | Aerial crop survey |
| Crop spraying | Hazardous waste disposal |
| Inspection: Fire/electrical/building/equipment etc |  |

1. **When a vendor is required to handle or work on something that is owned by UC.**

|  |  |
| --- | --- |
| Vehicle maintenance/repairs | Fire extinguisher inspection and maintenance |
| Installation and balancing of vehicle tires | Calibration of instruments for research |
| Computer/phones repairs | Livestock transportation |
| Farming equipment repair | Fabric/furniture cleaning |
| Any other repairs  | Window/blind cleaning |
| Laundry services  | Transportation – buses where a driver is provided |
| Data processing/preparation | Statistical collection/analysis |
| Proofreading | Transcribing |

1. **When the vendor’s function is also carried out by a UC represented position.**

|  |
| --- |
| Custodial |
| Landscaping |
| Building maintenance (plumbing, HVAC, painters, etc). |
| Building cleaning: floors, windows, restroom, ceiling, air duct |
| Reprographics (large and small volume printing, copying, collating, book binding) |
| Catering/food services delivery  |
| Laundry Services |

**\*\* Purchases that are not considered services and can be purchased using a pcard or T&E card**

|  |
| --- |
| Florist and flower delivery  |
| Utilities (phones, PG&E, internet, water) |
| Taxis (Uber, Lyft, cabs, rideshare) |
| Mail services (couriers, Fedex, UPS, USPS) |
| Mobile shredding services (when the office location is more than 10 miles from UC Davis). Requires pre-approval from UCD Pcard Administrator.  |
| Catering (when the office location is more than 10 miles from UC Davis) |
| Bottled water delivery  |
| Self service printing/copying |

Technology-related services (i.e. web-hosting, Zendesk, Linkdin, cloud, Box, Constant Contact, online tools/apps, Docusign, Adobe, etc). IT-related services follow a separate process, see Purchasing IT Software services for more information.

Positions covered by SX

Positions covered by SX-represented positions require a wage & benefits parity assessment by UC ANR Employee Labor Relations and must meet at least one of the exceptional conditions listed below:

* Emergency need
* Lack of sufficient quantity and/ or expertise
* Incidental to a contract for the purpose or lease of real property
* Urgent, temporary or occasional
* Remote and not within a 10-mile radius (lack of equipment, material, etc.) of a UC campus

|  |  |
| --- | --- |
| Ag Tech Airport Svc Worker Animal Tech Assistant Auto Attendant Auto Equipment Operator Auto Tech Baker Baker Bldg Maintenance Worker Cook Cook Housekeeper Custodian Delivery Worker Drapery Maker Driver Equip OprFarm Laborer Farm Mach Attendant Farm Mach Mech Farm Maint Worker  | Food Svc Worker GardenerGroundskeeper Grounds Equip Opr Hvy Duty Equip Tech Lab Helper Laborer Laundry Mach Opr Linen Svc Worker Mail Processor Nursery Tech Parking Ast /ReprPest Control Opr Reprographics Tchn Scrty Guard Sports Ast Storekeeper Stores Worker Tree Trimmer |

Review of existing service agreements

The University has until January 31, 2021 to review existing agreements to either in-source the service or provide justification, per exceptions below. All new service agreements must be reviewed and will only receive exceptional approval if they meet at least one of the categories below:

* Emergency need
* Lack of sufficient quantity and/ or expertise
* Incidental to a contract for the purpose or lease of real property
* Urgent, temporary or occasional
* Remote and not within a 10-mile radius (lack of equipment, material, etc.) of a UC campus

**Reference documents**

Regents Policy 5402: Policy Generally Prohibiting Contracting for Services

UC ANR Contracting out of Services

Review and approval of contracting out of services workflow

ANR Request for Contracting Out Services Form

Wage and Benefit Parity Appendix - Final - 02252020

Purchase Request Form

Questions:

SX covered purchases - Mary Vlandis, UC ANR ELR - maryvlandis@ucanr.edu

Not sure if your purchase is a service or you identify a service not listed above contact the Business Operations Center