

UCOP CONTRACTING FOR SERVICES PROCESS UPDATES

Effective immediately, UC policy governing contracting for services has been updated by the UCOP Human Resources Policy unit in consultation with the Chief Financial Officer, Procurement Services, and the Office of General Counsel. As an outcome of that review there are significant updates to the requirements. The changes are effective immediately and are documented in totality in [UC Policy BUS-43 Purchases of Goods and Services; Supply Chain Management](#).

The most significant changes are as follows:

- The [Independent Contractor Guidelines for Federal Tax Purposes and Classification Worksheet](#) (Exhibit C, page 21) have been updated.
- A [UC Procurement Professional's Contract Checklist](#) has been developed and new agreements will be reviewed to ensure compliance with the guidelines on the checklist. Local Procurement will complete this form in conjunction with the requesting department.
- Revised [Contracting for Services Guidelines](#) with an additional focus on contracting out and potentially displacing staff.

These policy updates have changed the way departments will work with Local Procurement. The biggest day-to-day change relates to the [Independent Contractor Guidelines and Classification Worksheet](#).

The requesting department will need to work with OP Local HR to complete the Contractor Classification worksheet before Local Procurement can begin working with the requesting department on the agreement.

Currently, requesting departments submit their requests directly to Local Procurement to initiate procurement and contracting activity.

The updated process is as follows:

The requesting department will submit the Contractor Classification worksheet to Local Procurement through the ucopcontractor@ucop.edu mailbox. Local Procurement will log the request and forward the document to Local HR via e-mail within 1 business day of receipt.

Local HR will contact and work with the department to complete the classification worksheet and return the completed document to Local Procurement.

Local Procurement will contact the requesting department and proceed through completion of the procurement process inclusive of securing any other supporting documentation (AC&C, Decision memo or MPI, SOW etc...)