

LHS GUIDE FOR PROFESSIONAL SERVICES

(Purchase Orders: Federally Funded orders >\$3,500 AND any other fund source >\$10,000)

QUESTIONS TO ASK AND THINGS TO KNOW	FORMS/POLICY
<p>A. Determining the type of Professional Service Agreement (PSA) that is needed</p>	<p>Professional Services Independent Contractors Independent Consultants</p>
<p>B. Is PSA is over 20K? (<i>Extramural C or G exempt</i>)</p>	<p>Requestor will additionally need to complete Student Affairs Non-Compensation Review form and submit to Flori Ramos. (<i>LHS Buyer will send form to Requestor post-consultation</i>)</p>
<p>C. Are the services under \$99,999.99 per year?</p>	<p>Requestor must complete the Proof of Price Reasonableness & Source Justification form documenting the business need, why the price is reasonable, and why other Suppliers didn't meet your department's needs. (<i>LHS Buyer will send form to Requestor post-consultation</i>)</p> <p>Involve the LHS Buyer before soliciting proposals or quotes from qualified suppliers. A reasonable price need not be the lowest price available, but it is one which offers the highest total value to the University. Campus Supply Chain Management will review source justification and determine if further competitive bidding or other research is needed to validate prices.</p>
<p>D. Are the services >\$99,999.99 per year?</p>	<p>If yes, California Contract code & BFB-BUS 43 require that services must be competitively and publicly bid by a minimum of 3 vendors.</p> <ul style="list-style-type: none"> • Contact your LHS Buyer for assistance with public competitive bidding. • Ensure that you have checked the market and identified qualified responsible suppliers <p>There are limited exceptions to competitive public bidding allowed for:</p> <ul style="list-style-type: none"> • Personal services • Professional services (which require licensing and errors and omissions insurance) • Sole Sources (the item or service is unique and available only from a single source) • Designed to match others, used in, or furnished to, a particular installation, facility, or location (PCC) (Note: this must be necessary to the continuing function of an existing installation, facility, location) • When an emergency situation exists (BFB-BUS 43) <p>For all orders >\$99,999.99 seeking an exception to competitive public bidding, Campus Supply Chain Management will review reasoning and deem if appropriate.</p>

QUESTIONS TO ASK AND THINGS TO KNOW	FORMS/POLICY
Are the services >\$99,999.00 per year? <i>(continued)</i>	BFB-BUS 43
E. Is there an existing agreement in place within UC Berkeley?	If yes, consult with LHS Buyer Contracts
F. Are the services of a type that are currently being performed by a UC Employee?	There are special considerations and restrictions for represented employees covered by Presidential guidelines, union contracts. UCB Bargaining Units
G. Is an Individual or sole proprietor completing the services?	If yes, the Requestor will need to complete the Pre-Hire Worksheet to help the campus comply with IRS regulations. BFB-BUS 34 <i>(LHS Buyer will send form to Requestor post-consultation)</i>
H. Are there any federal funds: grant or contract to be spent for this purchase?	The grant/contract# will need to be provided on the Initial Questionnaire Form along with a copy of the budget
I. Have the services already started been delivered?	This is a violation of University policy which is contained in BFB-BUS 43, Materiel Management. Consult with the LHS Buyer immediately
J. External Forms Vendor will be given to complete <i>(LHS Buyer will send to Vendor post-consultation)</i>	<ul style="list-style-type: none"> • Supplier's Proposal/Quote • UC Agreement (fully executed by a Buyer) • Conflict of Interest Form Conflict of Interest Guidelines • CA Partial Tax Exemption (if qualifies) • Identify the Supplier contact information; name, direct phone, and direct email.
K. Additional Requirements from Vendor	<ul style="list-style-type: none"> • Certificate of Insurance (COI) meeting UC Supplier Insurance Requirements (BFB-BUS 63) • Conflict of Interest • UC's "Fair Wage/ Fair Work" requirement • General Work for Hire Agreement– Ownership of any and all copyrightable works created by supplier pursuant to this purchase order, and all right, title and interest therein, shall vest in the University.