UCSB
Business & Financial Services

Fundamentals of Procurement
for: Letters and Science
November 15, 2010
Presented By: Kimberly Tapis & Calli Price

Agenda
- Overview: Policies and Laws, who we are, what we do &
don't do, procurement principals, purchasing methods
- Delegation of Authority
- Purchase Orders
- Conflict of Interest
- Prevailing wage
- Bidding & Sole Sourcing
- Strategic Sourcing: UCOP Contracts
- Contracts
- Recap

Overview
Overview: Team

Procurement is comprised of:

- **Purchasing Buyers** - Monica Yamasaki, Jason Gonzalez, Heather Perry & TJ Bloominger
- **Contracts** - Karen Jeffers, Kimberly Tapia & Aaron Barrett
- **Small Business Subcontracting** - Jason Gonzalez
- **Manager** - Cali Price
- **Chief Procurement Officer** - Jacob Godfrey

- Flexcard
- Gateway Helpdesk & Invoice Processing
- Equipment Management

Overview:

What we do:

- Reduce cost
- Mitigate risk
- Conflict of Interest
- Public competitive bids for goods/services
- Provide guidance, advice, and execute all business contracts
- Liaise with OMB and FAR auditors for federal procurement
Overview:
What we don't do:
- Construction or Facilities work
- Subawards, Contracts & Grants
- Gift processing
- Travel & Entertainment or Form 5 advice
- Reimbursements
- Honoraria
- Faculty & Staff Relocations/Moving

Overview: Purchasing Methods

<table>
<thead>
<tr>
<th>Then</th>
<th>Low Value invoices</th>
<th>LVPA &amp; Form 5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>High Value purchase orders</td>
<td>REX</td>
</tr>
<tr>
<td>Now</td>
<td>All purchase orders</td>
<td>Gateway</td>
</tr>
<tr>
<td></td>
<td>UCSB Furniture Services</td>
<td>Speed Type (GMC)</td>
</tr>
</tbody>
</table>

- FLEXCARD call Lynn or Vaughn
- We do not recommend reimbursements

Overview: Policy & Law
Delegation of Authority

Delegation: Procurement Authority
The Department Buyer can purchase, through the use of Gateway or Flexcard, up to the following thresholds:

- $3,500 on Federal funds for non-restricted commodities (GW and FC)
- $5,000 using the Flexcard for non-restricted commodities
- $10,000 with Non-Catalog suppliers for non-restricted commodities – GW only
- $50,000 with Contract suppliers (UC Strategic Sourced Agreements) – GW only
  Hosted Catalogs
  PunchOuts
  Suppliers with this Gateway classification

Delegation: Who Can Sign/Approve a Contract or Quote/Proposal?

- A contract signed by anyone without delegation of authority is void, but the signatory might also be personally liable for the contract obligations.

- The Board of Regents delegates to each Chancellor the authority to execute business contracts, who in turn provided delegation on behalf of the Regents to:
  - Chuck Haines
  - Jacob Godfrey
  - Kimberly Tapia
  - Jim Corkill
  - Calli Price
  - Karen Jeffers
Purchase Orders & Contracts

Purchase Order vs. Contract

Purchase Order
- Goods
- Routine Services
- Preventative Maintenance
- Off the Shelf Software (no customization, is not working with sensitive data)

Contract Request Form
- Non-Academic Speakers
- Facilities Use Permit
- Hotel/Restaurant Group Reservation
- Event Agreement
- Customized Software Licenses
- Confidentiality Agreement
- Film Permit
- Property Agreements
- Any supplier agreement REQUIRING an signature

Department Buyer Checklist

www.uauc.edu/files/forms/Form1.pdf
Requisition (PR) Requirements

Quotes:
- recommended for every order
- required if routed to Procurement
- required for Equipment Management approval

Requisition (PR) Requirements

Vendor Blankets:
- Services that are ongoing such as:
  - temporary personnel invoices,
  - copier or equipment maintenance,
  - cell phone charges
- One-year initial period, may be extended using one-year periods (Vendor Blanket Revision Form)
- If expired two months or longer you will need to setup a new VB.

Requisition (PR) Requirements

Vendor Blankets (cont.):
- UC contract or a UCSB bid can be set up through the contract end date to match the contract terms.

- If VB exceeds $100k annually, we must go out to bid (unless using a UC contract).
Restricted Commodities

- Air Shipment Systems
- Animals
- Bio-hazardous Agents
- Building Alteration
- Charters (Air, Bus, Sea Vessel)
- Equipment Rentals
- Facility Repairs
- Firearms
- Household and Office Moves
- Inventorial Equipment
- International Shipments
- Logos - Use of UC name
- Narcotics & DEA Controlled Chemicals
- Precious Metals
- Radioactive Materials
- Real Estate Rents/Lessees
- Refrigerators/Freezers
- Respiratory Protective Devices
- Valet Services

*Personal items (refrigerators to store lunch, microwave, toasters, artwork, plants, etc.) cannot be purchased using any UC funds.

International Orders

Any acquisition shipped from another country (including Mexico and Canada) is considered Restricted and needs to be routed to Procurement. The UC has authorized only the following company to act as the Power of Attorney to accept imports on behalf of the Regents:

American Cargoservice, Inc.
UC Contract # 085/OP/050
855-565-4125  UC@acssan.com

Note: FEDEX is ok for small packages
Air Sea Forwarders is NOT allowable

Purchasing & Facilities/DCS

**Construction (D&CS/Contracting Services)

Maintenance (Procurement) usually is characterized by its routine or recurring nature, the purpose of which is to keep facilities and systems in good working order.

**Infrastructure (FM) Maintenance orders for buildings;
- HVAC
- Painting
- Window Cleaning
- Flooring
- Carpet Cleaning
Conflict of Interest

- UC employees may not contract with any University department to provide goods or services.
- UC near relatives may not contract with any UC campus or department if the goods/services are available otherwise.

The State of California Political Reform Act prohibits an employee from making or participating in the making of a decision if there is a financial conflict of interest.

Prevailing Wage
Prevailing Wage

Samples of categories over $999.99:

- Modular furniture installation
- Appliance installation
- Elevator maintenance
- A/V installation (attaching anything to the wall)
- Landscaping
- Pool chemical delivery
- Carpet
- Bay Alarm installations (fire alarms, etc)

No splitting orders

NOT INCLUDED: lab equipment onsite servicing/repair

---

Prevailing Wage

What is needed?

- Supplier is REQUIRED to be registered with the California Department of Industrial Relations (DIR)
  ($300 annual fee for the supplier)

- Procurement files a PWC100 Form with the DIR for each requisition

---

Bidding & Sole Sourcing
Competitive Bid Process

Purchases of goods and services (other than Professional Services) over $99,999.99, excluding tax, must be competitively bid. Procurement Services use one of the following methods as basis for award:

1. **Cost Alone**
2. **Cost Per Quality** - Quality points are assigned to categories such as: delivery, warranty, history of service, specifications.

Please allow 2-3 weeks for the bid process!

Non-Federal Sole Sourcing

Use a sole source for purchases over $99,999.99, when only one specific supplier is available. Complete a Sole Source Justification (Form A) and Sole Source Disclosure (Form A-1).

The Sole Source Form A must contain:
1. A clear statement of the unique performance factors;
2. Why those unique factors are required;
3. What other products or suppliers were evaluated;
4. The reason(s) for rejecting the other products or suppliers.

[http://www.bfs.ucsb.edu/procurement/forms](http://www.bfs.ucsb.edu/procurement/forms)

Non-Federal Sole Sourcing

**Justifications:**

- Evidence of extraordinary or unusual trade or market conditions or contingencies that preclude the availability of qualified alternate suppliers.
- Necessity of acquiring property item that must match with existing equipment or systems and is available only from the original manufacturer.
- Necessity of acquiring items possessing specific features essential for the completion of the task and are available from only one source in the world.
- Change of brands or manufacturers would compromise the continuity and integrity of the project.
- Manufacturer has the exclusive right to make and/or sell this unique item or provide such service.
Non-Federal Sole Sourcing

Non-allowable justification:
> Departmental preference for a specific supplier, product or service.
> Budgetary considerations or constraints.
> Historical precedence or a claim of best price. Only current competitive bidding in the open market substantiates best possible pricing.
> Pre-work with the selected supplier to customize the equipment, thereby excluding competition.
> Federal funds: Geographical preferences.

Strategic Sourcing

UC Strategic Source Agreements

Strategic Sourcing is an effort by UCOP to leverage the collective spend of the UC campuses, laboratories and hospitals to obtain greater cost efficiencies in its procurement contracts by providing:
- Lower pricing
- Enhanced product quality
- Higher service levels
- Net 30 terms
- Free shipping
- Favorable UC terms and conditions
- Total cost of ownership
Cost Purchase Price vs. Total Cost of Ownership

Total Cost of Ownership (TCO)
- Transaction / Administrative Costs
- Delivery / Freight / Handling / Tax/Ship
- Implementation Cost
- Training
- Communications / Marketing
- Productivity
- Risk / Liability
- Cost of Non-Compliance
- Maintenance / Warranty / Parts
- Yield / Useful Life / Consumables
- Energy / Waste disposal
- Inventory / Staff idle
- Returns / Troubleshoot
- Reselling / Disposal

To Search For an Agreement...

Go to the detailed list of UC Strategic Sourcing Agreements at:
https://solutions.scquest.com/apps/RouterLogin?OrgName=UCOP&URL=

Login: ucbsuser  Password: UCBSuser

Enter the product or supplier name to see a list of search options, or click on "display all" to see the complete list.

http://www.bfs.procurement/strategic-sourcing

Contracts

http://www.bfs.ucsb.edu/procurement/contracts-property
Contracts - Overview

- Two types of contracts:
  - Expenditure
  - Revenue

- I Do have a supplier-provided contract. Attach it to the Contract Request Form using the "Internal Attachments" field.

- I Do not have supplier-provided contract. Complete the UCSB Form I: Request For Services:
  - Describe the services to be provided. SCOPE OF WORK

Contracts - Overview

- Is the price Reasonable? For Professional Services, please provide a Form M (PCC 10508), or a Form A if the expenditure is using federal funds.

- Contract work cannot begin until Procurement has signed on behalf of the Regents. By starting without a signed contract you are taking the risk of:
  - Non-payment to your Provider
  - Misunderstanding in scope of work
  - Financial Losses
  - Liability to the University

Contracts: supplier-Provided Contracts

- Common Issues
  - Supplier will not agree with UC terms & conditions:
    Note, if the supplier will not agree to a UC-requested provision, and your dept still requires the goods/services, we will ask your department to accept the risk in writing.
  - Automatic renewals/evergreen clause
  - Prepayment requests
  - Use of UC Name/Logo
  - Indemnity provisions
Contracts: Air and Sea Charters

- Air charters require Chancellor and Risk Mgmt. approval.
  - insurance
  - UC template agreement, and
  - Waivers of Liability

- Sea charters (research vessels/submarines) require Risk Management approval.
  - insurance
  - report of safety vessels
  - UC template agreement
  - Waivers of Liability

Contracts: Boat and Bus

- Boat rides open to the public (such as the Channel Islands hopper) does NOT require a contract, since this is not a “chartered” trip, but does require Waivers of Liability.

- Buses require insurance and Waivers of Liability. Bus trips can be paid either through Annette Gonzales, or through Gateway. Procurement can help with the insurance.

Wrap-up and Tips
What takes so long?
We have a checklist that includes over 150 items to consider, and over 100 PO clauses we need to check for each requisition. Examples include:

- Is it federally funded?
- Is it a professional service or consultant?
- Is it a follow-on agreement?
- Do we need to sign anywhere?
- Do we need to get one more for formal bid?
- Do we need to collect insurance?
- Is it subject to Prevailing wage or Fair Wage?
- Are the terms reasonable?
- Will the agency require regulated or confidential info?
- Is the order shipping internationally?
- Is the sole source and/or price reasonableness justification valid and legal?
- Can we use a UCCE supplier?
- Does the approved price in Recharge packages?
- Is this subject to export control?
- Does the quote have terms and conditions?
- Are we the correct department?
- Will the UC name be kept confidential?

Contracts: Recap

- Please plan ahead: Event is tomorrow = not enough time for a contract.
- Get a fully signed contract in place before starting the work.
- Be mindful about signature delegation.
- We cannot contract with a UC employee.
- If using the Request for Services Form, complete all sections in detail.
- Ask your supplier for insurance up front or let us know via a comment if you are seeking an Insurance Waiver.
- Before sending us the contract, be sure your end user(s) and Responsible Parties have reviewed, understood, and can agree to the Contract.

Procurement Helpdesk: x8025
Email: help@gateway.procurement.ucsb.edu
http://www.bfs.ucsb.edu/procurement/welcome

Contracts Helpdesk: x4670
Email: contracts@bfs.ucsb.edu
http://www.bfs.ucsb.edu/procurement/contracts-property
Conflict of Interest Quiz

- My department needs a truck, and one of our colleagues at UCLA has offered to sell us hers at a reasonable price. Can we do that?

- As a convenience, a Professor wants to sell students in his class a lab kit that contains the most commonly used instruments needed in the lab section. Is that ok?

- A Student Affairs employee's husband has provided us with a quote to build our website. Can we setup a PO in Gateway?

Purchasing - Quiz

- I have a quote that includes terms and conditions, and a signature block. What should I do?

- Our watercooler sprung a leak over the weekend. Our carpet is soaked. Who do I call?

- If I know my department spends about $140,000 per year on a single commodity, can I split the purchase orders so they're each under $100k?

Contract Quiz

- A faculty member needs us to hire someone on a temporary basis to do editing, data entry, and transcription. Do I need a contract?
MAINTENANCE (Purchasing Department) vs. CONSTRUCTION (Design & Construction Services Department)

Maintenance or Construction Decision Tree

Maintenance: Maintenance is the upkeep of property, machinery, systems, and facilities including buildings, utility infrastructure, roads, and grounds. Maintenance consists of those activities necessary to keep facilities and systems operational and in good working order. It consists of the preservation, but not the improvement, of buildings and grounds, other real property improvements and their components. Maintenance may include replacement of components of equipment or building systems (roof, flooring, HVAC, etc.) if replacement is performed.

System: "A regularly interacting or interdependent group of items forming a unified whole". Systems related to University facilities are specifically defined in the FIRM (Facilities Infrastructure Renewal Model). Examples of facilities systems would be an HVAC system comprised of circulating pumps, fan coil units, etc. or an electrical system comprised of fixtures, service panels, etc.

Component: A component is "a constituent part" of a system. Examples of facility components would be a thermostat which is a component of an HVAC control system, or flashing which is a component of a roofing system. If the work associated with replacement of a system's component (s) is greater than 50% of the replacement value of its system, such work should be considered a system replacement and for the purposes of this article, shall be considered repair and beyond the scope of maintenance. In addition, if the value of the work associated with replacement of component (s) exceeds current University Minor Capital Project limits, the Facility shall obtain Office of the President concurrence prior to proceeding with the work on the basis of maintenance work as defined in this Chapter.

Replacement: Substituting systems or components no longer usable or adequate with items of the same kind.

[Diagram of decision tree showing flow from Need to Maintenance or Construction Decision Tree]
Fair Wage/Fair Work Decision Tree

When does FW/FW apply?

Will the services (not goods) be provided on one or more UC locations?

No

Yes

Are services funded by extramural agreement?

No

Yes

Are services a Public Work and paid more than FW/FW?

No

Yes

FW/FW DOES NOT apply

FW/FW DOES apply

Revised 10/1/15
# UC SANTA BARBARA
## DEPARTMENT PURCHASE REQUISITION CHECKLIST

<table>
<thead>
<tr>
<th>Gateway PR #</th>
<th>Prepared By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier</td>
<td>Dollar Amount</td>
</tr>
</tbody>
</table>

### 1. Is the quote and supporting documentation attached? **Note:** quotes are required on federal funding over $3,499.99, restricted commodities, and orders over $10k

- **Yes**
- **No**

### 2. Is the total of the acquisition, before tax, over $99,999.99?

- **Yes**
- **No**

**If Yes:** Contact Purchasing to determine if a bid is required. Do not advance the requisition.

### 3. Is the purchase being shipped internationally, or does the quote specify the goods are subject to Export Control, ITAR, or EAR? [link](http://www.research.ucsb.edu/compliance/export-control/frequently-asked-questions/)

- **Yes**
- **No**

**If Yes:** Use the dropdown on the requisition under Additional Order Details to Ad-Hoc in Export Control.

### 4. Are the Commodity Code and Object Code correct?

- **Yes**
- **No**

**Do not** leave the default “Spot Buy Products” on Commodity Code “00”. Check and correct code(s) as needed. [link](http://www.bfs.ucsb.edu/sites/www.bfs.ucsb.edu/files/forms/UCSB%20Gateway%20Commodity%20and%20Object%20Code%20Listing%20February%202016.xls)

### 5. Is this order Inventorial Equipment?

- **Yes**
- **No**

**If Yes:** Use the dropdown for Inventorial Equipment, and ensure the object code is in the 9000 series so the requisition routes to Equipment Management.

### 6. Will the UC name (any UC derivative) or logo be used on tangible goods? (printing for ads, letterhead, business cards, etc. not applicable)

- **Yes**
- **No**

**If Yes:** Route to Campus Purchasing using the drop-down for Restricted Commodities. The vendor will need to be registered with Carol Cox at the bookstore to use our Name/Logo.

### 7. If Equipment, will it be used for research more than 50% of the time?

- **Yes**
- **No**

**If Yes:** The purchase may qualify for a Partial Tax Exemption. Be sure Campus Purchasing is in the requisition workflow to enter the tax discount, and use the Form. [link](http://www.boe.ca.gov/sutax/manufacturing_exemptions.htm#Qualifications)

[link](http://www.boe.ca.gov/pdf/boe230m.pdf)

### 8. Is this a Vendor Blanket?

- **Yes**
- **No**

**If Yes:** Ensure the description is a full paragraph, with a period of coverage of 1 year or less. (Note: if a formal bid was awarded, the period of coverage may be entered through the end of the award.)

### 9. Is the product coming from outside the US?

- **Yes**
- **No**

**If Yes:** Click the Restricted Dropdown, and select “International Purchases”. Check this website [link](http://www.bfs.ucsb.edu/procurement/goods-and-services) for more information on international orders and Customs Brokers. **Note:** If the vendor is paying for the shipping entirely, you will not be invoiced from our Customs Broker, but if the vendor is charging you for shipping costs, our Customs Broker must be used.

### 10. Is this a Restricted Commodity? [link](http://www.bfs.ucsb.edu/sites/www.bfs.ucsb.edu/files/docs/procurement/Limited%20Items%20List%20-%20April%202015.docx)

- **Yes**
- **No**

**If Yes:** Use the drop-down for Restricted Commodity to select the correct item for routing.

### 11. Is the funding Federal, and the dollar amount is over $3,499?

- **Yes**
- **No**

**If yes:** Analyze the completed and attached Form A. Does it make sense? Work with the end user to ensure the Form is completed correctly before submitting to Procurement.
Tips for submitting a successful federal purchase using Form A:

- Utilize Price Analysis wherever possible; competition should be sought with all federal orders, and will speed up the process of your order.
- If at all possible, use a UCOP Agreement vendor; using contract pricing will also speed up your order.
- If using a Sole Source, be sure to answer the question completely. We are looking for specific features or parameters to explain why this is the only vendor that can provide the purchase.
- The Price Reasonableness section is required. The answer to this question lets the Government know their money is being spent wisely. If this is a sole source, explain how you know it's a good price. If the vendor provided an Educational or other discount, add it to the commentary.
# Procurement Services & FlexCard - Restricted Commodity & Routing List

<table>
<thead>
<tr>
<th>Restricted Items</th>
<th>Department Approvals</th>
<th>EHS Approvers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Above ground &amp; Underground storage tanks</td>
<td>EH&amp;S Environ. and Procurement</td>
<td>Jodi Woods</td>
</tr>
<tr>
<td>Aerial Lifts (single mast, scissor, bucket truck, articulating boom lifts)</td>
<td>EH&amp;S General Safety</td>
<td>John Seaman</td>
</tr>
<tr>
<td>Alarm Services / Security Services / Security Cameras</td>
<td>Procurement Services</td>
<td>Rick Alvarado</td>
</tr>
<tr>
<td>Alcoholic beverages</td>
<td>Restricted on State funds; if a vendor is serving alcohol, they must be ABC certified</td>
<td></td>
</tr>
<tr>
<td>Ammunition</td>
<td>Equipment Management</td>
<td></td>
</tr>
<tr>
<td>Animals and Tissue</td>
<td>IACUC</td>
<td></td>
</tr>
<tr>
<td>Antibodies – Custom</td>
<td>IACUC &amp; Procurement</td>
<td><a href="mailto:iacuc@lifesci.ucsb.edu">iacuc@lifesci.ucsb.edu</a></td>
</tr>
<tr>
<td>Autoclaves (Steam Sterilizers)</td>
<td>EH&amp;S Biosafety</td>
<td>Jamie Bishop</td>
</tr>
<tr>
<td>Automated External Defibrillator (AED)</td>
<td>EH&amp;S Gen Safety</td>
<td>John Seaman</td>
</tr>
<tr>
<td>Auctions – Ebay</td>
<td>Not Allowed</td>
<td>Rick Alvarado</td>
</tr>
<tr>
<td>Biohazardous organisms</td>
<td>EH&amp;S Biosafety</td>
<td></td>
</tr>
<tr>
<td>Biosafety cabinets</td>
<td>EH&amp;S Biosafety</td>
<td>Jamie Bishop</td>
</tr>
<tr>
<td>Boats</td>
<td>EH&amp;S Dive &amp; Procurement</td>
<td>Eric Hessell</td>
</tr>
<tr>
<td>Cable / TV Services</td>
<td>Procurement Services</td>
<td></td>
</tr>
<tr>
<td>Carpet, floor coverings &amp; installation</td>
<td>Facilities Management/DCS</td>
<td></td>
</tr>
<tr>
<td>Catering</td>
<td>UCEN &amp; Travel/Entertainment</td>
<td></td>
</tr>
<tr>
<td>Charter – Air &amp; Boat</td>
<td>Procurement &amp; Risk Management</td>
<td></td>
</tr>
<tr>
<td>Charter – Bus</td>
<td>Procurement</td>
<td></td>
</tr>
<tr>
<td>Compressed Toxic or Pyrophoric Gases</td>
<td>EH&amp;S Lab Safety &amp; Procurement</td>
<td>Hector Acuna</td>
</tr>
<tr>
<td>Construction equipment rental, remodeling or services</td>
<td>Facilities Management/DCS</td>
<td></td>
</tr>
<tr>
<td>Cranes and Hoists</td>
<td>EH&amp;S General Safety</td>
<td>John Seaman</td>
</tr>
<tr>
<td>Diesel portable or stationary generator 50 horsepower or greater</td>
<td>EH&amp;S Environ. &amp; Procurement</td>
<td>Jodi Woods</td>
</tr>
<tr>
<td>Diesel self-propelled off-road vehicles 25 + horsepower</td>
<td>EH&amp;S Environ. &amp; Procurement</td>
<td>Jodi Woods</td>
</tr>
<tr>
<td>Donations</td>
<td>Not Allowable</td>
<td></td>
</tr>
<tr>
<td>Drugs / Controlled Substances - require DEA license</td>
<td>EH&amp;S Radiation, EH&amp;S Industrial Hygiene &amp; Procurement</td>
<td>Derek Iverson</td>
</tr>
<tr>
<td>Dust Masks and other respirators</td>
<td>EH&amp;S Industrial Hygiene</td>
<td>Jesse Bickley</td>
</tr>
<tr>
<td>Equipment Rental or Lease</td>
<td>Procurement Services</td>
<td></td>
</tr>
<tr>
<td>Facility repairs, renovations (carpentry, electrical, painting, etc.)</td>
<td>Design &amp; Construction</td>
<td></td>
</tr>
<tr>
<td>Firearms</td>
<td>Equipment Management</td>
<td></td>
</tr>
<tr>
<td>Fire extinguishers and other fire suppression systems, and Fireworks or other pyrotechnic devices</td>
<td>EH&amp;S Fire Protection</td>
<td>Joe Harkins</td>
</tr>
<tr>
<td>Category</td>
<td>Procurement Services</td>
<td>Contact Name 1</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>-----------------------------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Foreign Purchases / International Purchases</td>
<td>Procurement Services</td>
<td>John Seaman</td>
</tr>
<tr>
<td>Fork Lifts (gas, LPG, diesel, electric, and electric pallet jacks)</td>
<td>EH&amp;S General Safety</td>
<td></td>
</tr>
<tr>
<td>Fume hoods / fume extraction devices/slot hoods</td>
<td>EH&amp;S Lab Safety</td>
<td>Hector Acuna</td>
</tr>
<tr>
<td>Goods/Services provided by Businesses Owned by UCSB Employees/Near-Relatives of UCSB Employees</td>
<td>Not Allowed</td>
<td></td>
</tr>
<tr>
<td>Harbor/Marine</td>
<td>Procurement &amp; Risk Management</td>
<td></td>
</tr>
<tr>
<td>Human and/or primate tissues/fluids/cell lines</td>
<td>EH&amp;S Biosafety</td>
<td>Jamie Bishop</td>
</tr>
<tr>
<td>Janitorial Services</td>
<td>Facilities Management</td>
<td></td>
</tr>
<tr>
<td>Lasers</td>
<td>EH&amp;S Radiation</td>
<td>Jim Casto</td>
</tr>
<tr>
<td>Legal Services</td>
<td>Procurement Services</td>
<td></td>
</tr>
<tr>
<td>Logo: any apparel/fixture item being purchased using the UC name and/or logo. (includes UC, UCSB, and the University of California)</td>
<td>Procurement Services</td>
<td></td>
</tr>
<tr>
<td>Maintenance Service Agreements</td>
<td>Procurement Services</td>
<td></td>
</tr>
<tr>
<td>Office Trailers</td>
<td>Procurement &amp; Risk Management</td>
<td></td>
</tr>
<tr>
<td>Personal items: Refrigerators, Microwaves, coffee makers, artwork, plants/flowers, coffee, cards) &amp; Insurance</td>
<td>Not Allowed</td>
<td></td>
</tr>
<tr>
<td>Precious Metals</td>
<td>Procurement Services</td>
<td>Hector Acuna</td>
</tr>
<tr>
<td>Pressure vessels</td>
<td>Procurement Services</td>
<td></td>
</tr>
<tr>
<td>Professional Service, Personal Service, Independent Consultant Agreements &amp; Contract Employee Services</td>
<td>Procurement Services</td>
<td></td>
</tr>
<tr>
<td>Propane Gas</td>
<td>EH&amp;S Lab Safety</td>
<td>Hector Acuna</td>
</tr>
<tr>
<td>Radioactive materials, or devices which contain radioactive material</td>
<td>EH&amp;S Radiation &amp; Procurement</td>
<td>Jim Casto</td>
</tr>
<tr>
<td>Refrigerators &amp; freezers (laboratory use only)</td>
<td>EH&amp;S Lab Safety</td>
<td>Hector Acuna</td>
</tr>
<tr>
<td>Respirators and Dust Masks</td>
<td>EH&amp;S Lab Safety</td>
<td>Jesse Bickley</td>
</tr>
<tr>
<td>Rentals - trucks or trailers (example: U-Haul or United Rentals)</td>
<td>Procurement Services</td>
<td></td>
</tr>
<tr>
<td>SCUBA Equipment (compressors, air tanks, regulators, wet suits, etc.)</td>
<td>EH&amp;S Dive</td>
<td>Eric Hessel</td>
</tr>
<tr>
<td>Superconducting magnets</td>
<td>EH&amp;S Radiation</td>
<td>Jim Casto</td>
</tr>
<tr>
<td>Toxins (poisons produced by microorganisms)</td>
<td>EH&amp;S Biosafety</td>
<td>Jamie Bishop</td>
</tr>
<tr>
<td>Travel Expenses / Conference / Registration Fees</td>
<td>Not Allowable</td>
<td></td>
</tr>
<tr>
<td>Valet Services</td>
<td>Procurement Services</td>
<td></td>
</tr>
<tr>
<td>Vehicles (Cars, Trucks, Vans, SUVs)</td>
<td>Procurement Services</td>
<td></td>
</tr>
<tr>
<td>&quot;Virgin&quot; paper – non-recycled copy paper</td>
<td>Procurement Services</td>
<td></td>
</tr>
<tr>
<td>Welding equipment</td>
<td>EH&amp;S Gen Safety</td>
<td>John Seaman</td>
</tr>
<tr>
<td>X-Ray machines, cabinet radiography, electron microscopes</td>
<td>EH&amp;S Radiation &amp; Procurement</td>
<td>Jim Casto</td>
</tr>
</tbody>
</table>

*FlexCard Restricted Only = Website Services – route through Gateway, and Postage Stamps*