



Conferences and Event Planning

*Procurement Services Department Buyer Training Session
Tuesday, January 24, 2023*

UCI Division of Finance and Administration | With U • For U

Procurement Training

Robust **training guides** are available on the Procurement website and can be accessed from the top of our website.

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UCI Procurement
Services



In addition to the PDF training guides, you may find our interactive online courses on UCLC. You can also request personalized individual or group training available via [Zoom](#) or in person.



Capital Asset



PALCard



UCIBuy



Requisition



Purchase Order

Procurement Training

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In addition to our guides and micro-learnings, you can request a **one-on-one session** conducted via Zoom for a more personalized learning experience.

Please contact Shauna Niswonger at
shauna.n@uci.edu.

Today's Agenda

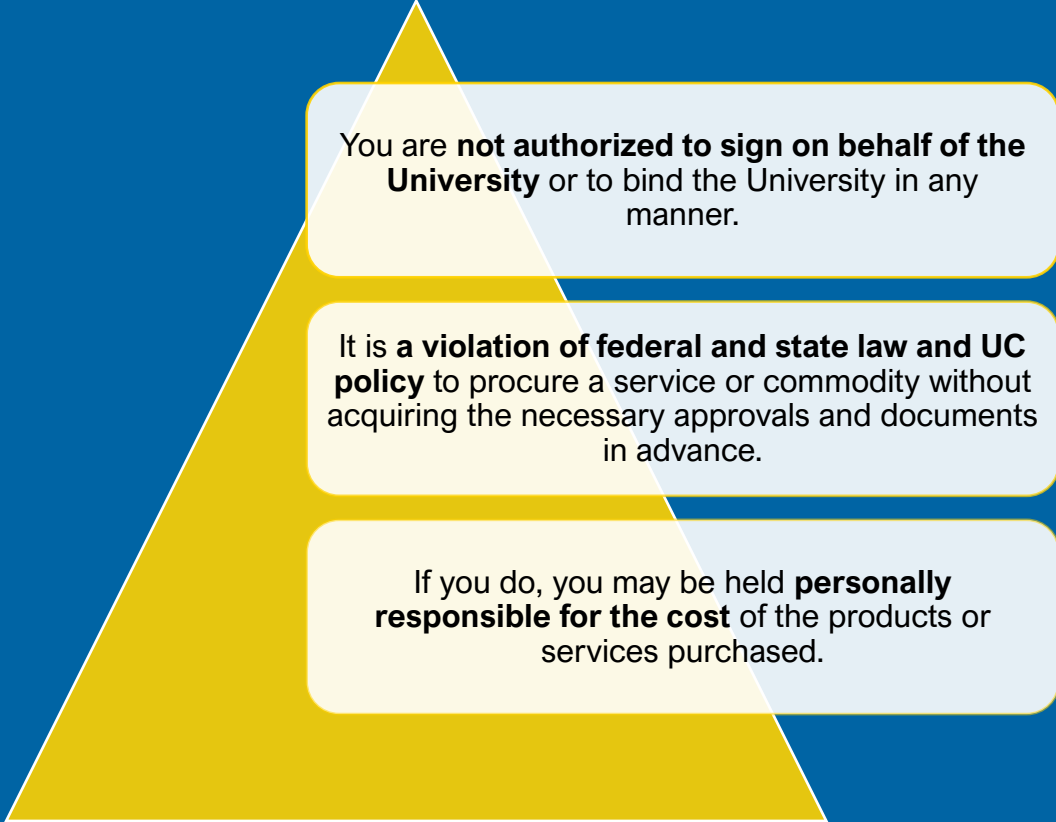
- Welcome
- Events Planning & Covered Services
- Rentals for On-campus Events
- Off-campus Events
- Resources
- Q & A



Remember

As an employee of a public university, it is your responsibility to comply with all procurement laws, rules, regulations, executive orders, policies and procedures concerning the purchase of goods and services:

- UCOP BUS-43
- UCI 707-10
- UCI 701-23
- California Public Contract Code
- Uniform Guidance
- Small Business First
- Covered Services



You are **not authorized to sign on behalf of the University** or to bind the University in any manner.

It is **a violation of federal and state law and UC policy** to procure a service or commodity without acquiring the necessary approvals and documents in advance.

If you do, you may be held **personally responsible for the cost** of the products or services purchased.

Contracts Team

Andrew Calderon

Procurement Contracts Manager

Laura Moss

Principal Contracts Analyst

Andrew Lim

Principal Contracts Analyst

Covered Services for on-site events

The covered services that are associated with on-site events, and that are the most problematic for UCI in terms of compliance with Article 5 and RP 5402 are:

Food services	• Strictly dropped off catered food does not fall under covered services. • UCI Dining Services is the only one that should be asked to cater all on-site events. • Only if UCI Dining cannot support the needs, can an outside caterer be used, after getting exceptional approval from Workforce Relations (WR) and establishing Wage and Benefit Parity with the supplier.
Table/chair setup	• Any setups that require specialized equipment that is not available in-house can be performed by an outside company. • For simple table and chair setups, a request should be made to Facilities Management (FM). • If FM is unable to support the event, an exceptional approval needs to be obtained from WR (providing proper explanation and documentation from FM). A supplier can then be used for these setups, after the Wage and Benefit Parity (WBP) amendment has been signed by the supplier. • Covered Services only applies to the labor portion of the setups.
Cleaning services	• Custodial/Janitorial services are covered services, so any clean-up efforts required after the event should be arranged with FM and utilization of outside companies avoided, unless FM cannot support the event and an exception can be granted by WR.

Clarification on Event Rentals

- If renting equipment from FM, set up and breakdown is currently included in the rental pricing. For larger order, labor charges will be applied on a case by case basis. Link to all FM equipment: [FM Rental Equipment list](#)
- Any other specialty tables/chairs can be rented from a supplier.
- Covered services applies to the labor portion of the rental only (including setup and breakdown), so it is recommended to explicitly distinguish the charges for rental equipment from labor.
- Drop off and pick up of rental equipment does not fall under covered services.
- FM prefer all event needs to be submitted on one FM work order. Example: Custodial needs (pre/post event cleanup, including bathrooms), FM Rentals, HVAC needs, etc. If requesting set up and breakdown of equipment being rented from supplier, please indicate that. Include time of setup and breakdown, and the items.
- The anticipated turnaround time from FM and Labor Relations is 24 – 48 hours.

Event Rentals from Signature Party Rentals

Signature Party Rentals specifies which of their tables and chairs fall under Covered Services - these are Standard Banquet Tables or Folding Chairs. All other rental items are considered specialty items and require specific set up procedures, thus can only be managed by trained Signature employees.

If working with a rental company other than Signature Party Rentals, please work with Workforce Relations and Facilities Management to establish proper steps for Article 5 compliance.

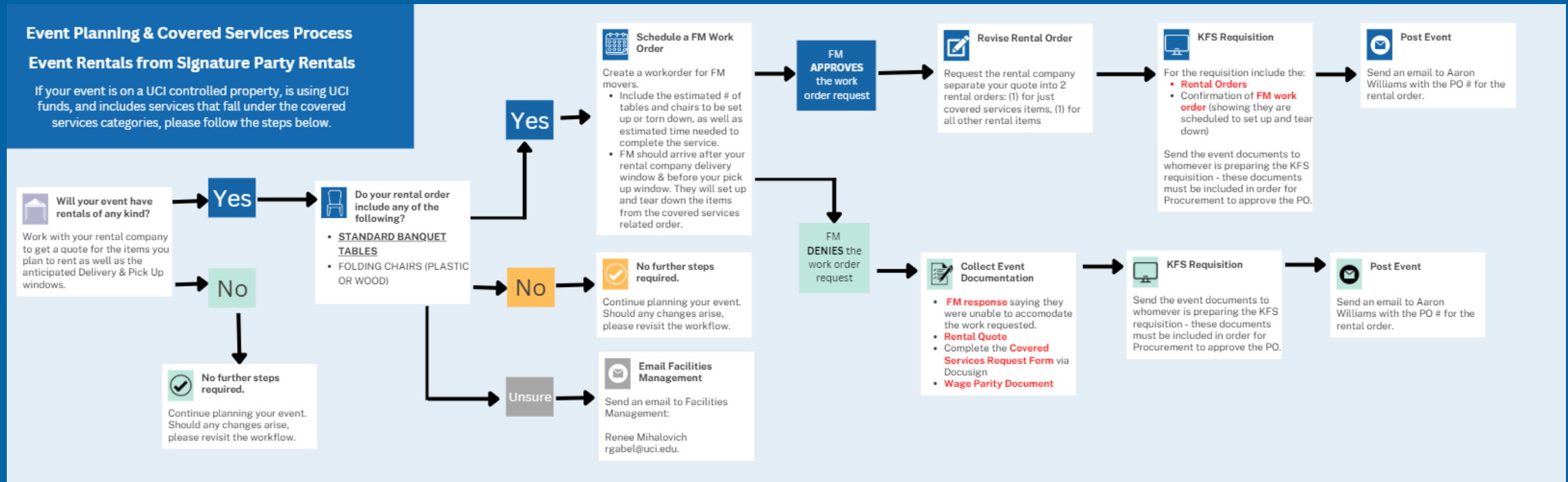
When completing the [Covered Services Request Form \(link\)](#) (commonly referred to as the Carve-Out form), the Department Head should be Assistant Dean level or higher.

The Wage Parity document can be obtained by emailing Aaron Williams, Workforce Relations Specialist, awilliams@uci.edu.



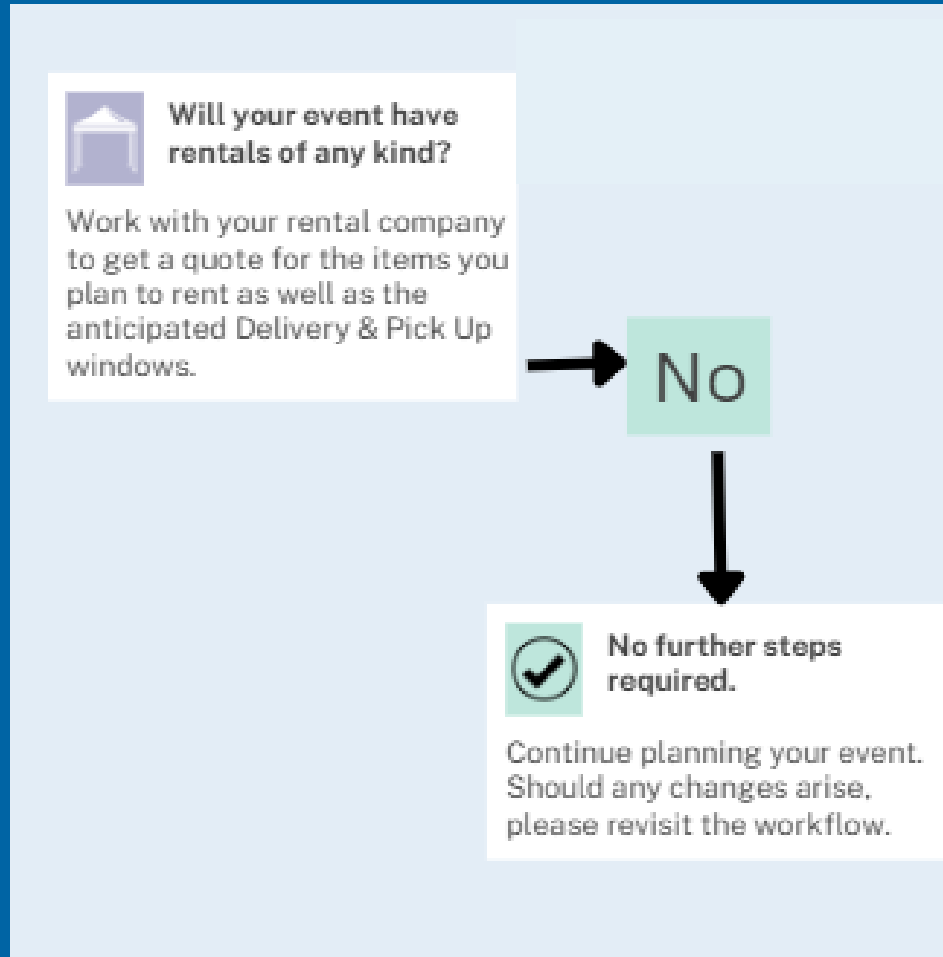
Event Planning & Covered Services Process

If your event is on a UCI controlled property, is using UCI funds, and includes services that fall under the covered services categories, please follow the steps below:



[Process Map \(link\)](#)

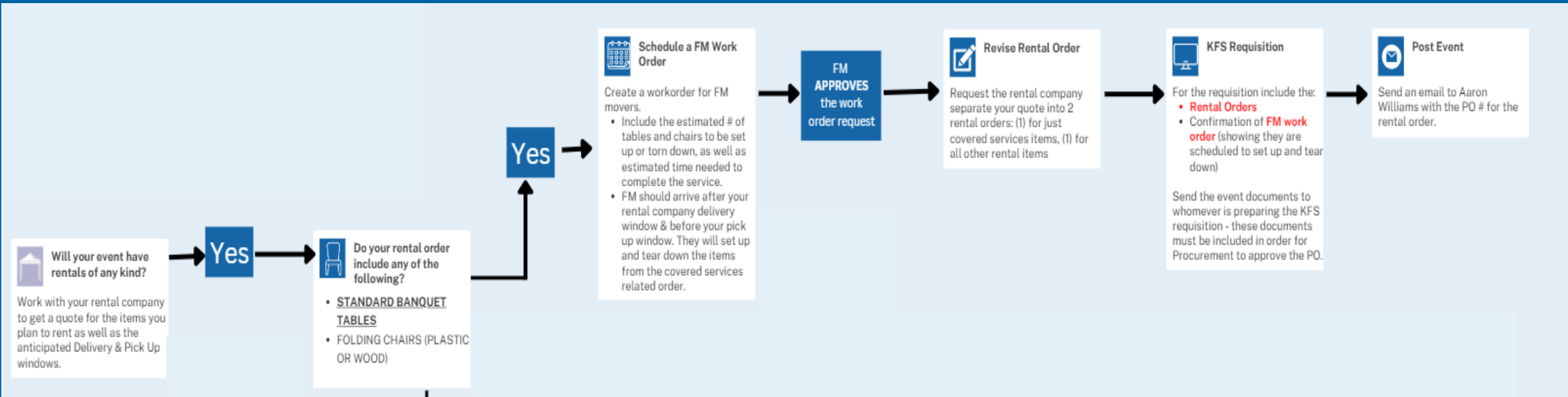
Event Planning & Covered Services Process



[Process Map \(link\)](#)

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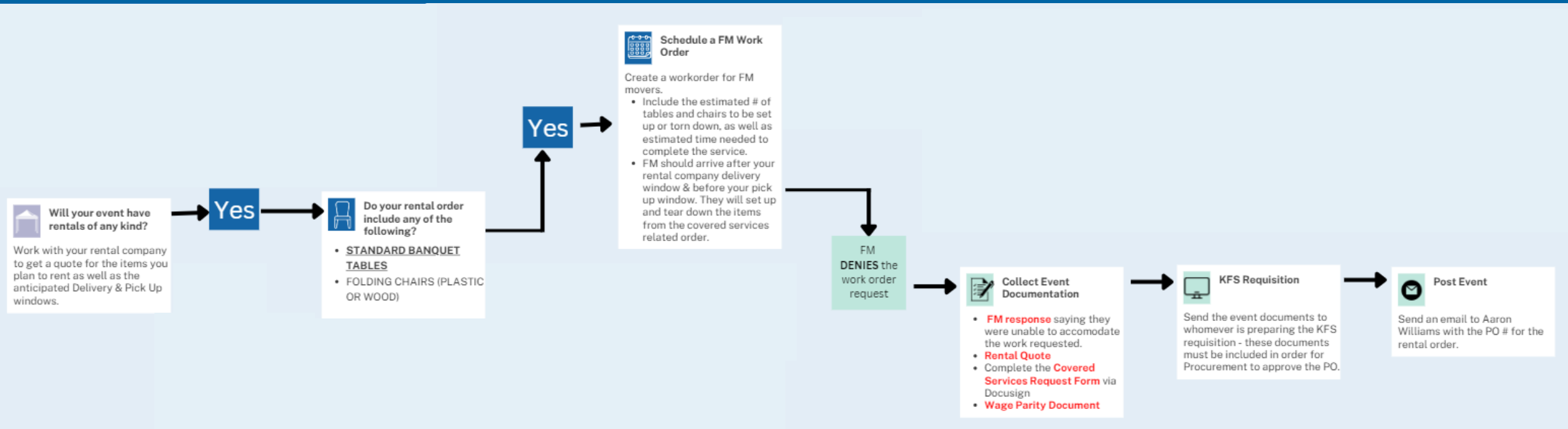
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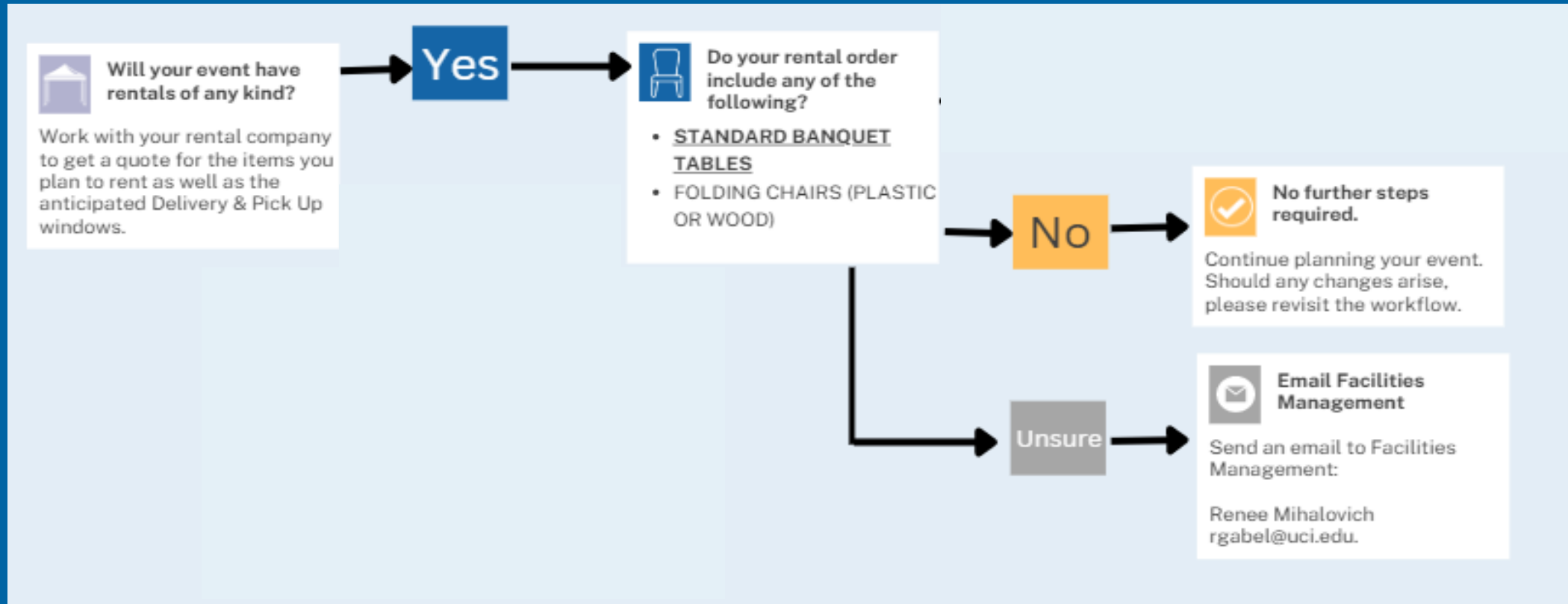
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[Process Map \(link\)](#)

Off-campus Events

Booking an off-campus venue for an event, party or conference, or securing a hotel room block for conference attendees usually involves a bilaterally signed agreement, **which requires Procurement's review and signature.**



Off-campus Events continued

As you consider a particular venue for your event, you need to consider more than just the price and suitability for your venue.

The following terms should be reviewed and negotiated when possible:

- 1. Cancellation rights and "liquidated damages"** - Liquidated damages are to compensate the venue for the money it would have made had UCI not cancelled. The further away the event is from the date of signing, the more likely a venue can rebook another event, so UCI's cancellation fee should be less. It is a good idea to try and negotiate the buyout or deadline to assert a cancellation right.
- 2. Minimums and attrition rates** – Room block agreements usually require meeting 80-90% of the expected reserved rooms. Event agreements usually require a minimum food and beverage spend.
- 3. Whether the venue requires use of its audio-visual vendors** – Venue required vendors may be significantly more expensive than arranging the services with UCI preferred vendors.

Event Agreement

- The most common reasons a venue cannot be booked is because **the venue's agreement requires UCI to be liable beyond what is allowed by law.** Some indemnity/liability clauses are written so broadly that UCI would be responsible for damages or claims caused by natural disasters, the venue's own employees, or random people walking in off the street.
- Even the indemnity/clauses that are written narrowly may still try to make UCI liable for contractors or guests.
- UCI's liability is set by state statute and is limited to claims caused by the negligent acts or omissions of employees. UCI has no authority to alter state law.
- Procurement will do its best to explain the state law limitations and negotiate acceptable language, but departments need to keep alternative locations in mind.



Agreement Review Request

To request Procurement's review of an event or room block agreement, please send the proposed agreement (unsigned) to Contracts@uci.edu with the following information:

- a description of the event and anticipated activities
- does this involve meeting/event space booking, securing a block of rooms for guests to book themselves, booking rooms for UCI employees, all of the above
- the number of attendees
- who those attendees are (UCI employees, students, external guests, all of the above)
- whether alcohol will be served (if yes, by whom)
- whether you plan to hire any outside (non-venue) service providers
- the planned method for paying the venue fees
- the name of the dept signer/approver

Misc Notes

The payment method options for UCI events is a dept issued Corporate Card or Purchase Order (if the venue accepts a check after the event). Personal payment and reimbursement is only an option for informal business meetings that do not require an agreement signed by UCI.

Other issues to be aware of:

- If you plan to serve alcohol at the event, you must complete the Alcohol Request Form (<https://food.uci.edu/catering-alcohol/alcohol-policies/>).
- All event and food/beverage expenses must comply with UC and UCI Hospitality policies (<http://policy.ucop.edu/doc/3420364/BFB-BUS-79>) and (<https://accounting.uci.edu/travel/entertainment/index.html>).
- It is a violation of state law for UCI employees to receive reward points from venues for UCI events. As an alternative, you can ask the venue to provide some other benefit or discount to UCI (not to the employee arranging the event) in lieu of awarding points.

Locations

Event venues that UCI has been able to finalize agreements with:

- Ayers Costa Mesa
- Beckman Center
- Barclay Theatre
- DoubleTree properties
- Hyatt Newport Beach
- Hyatt Huntington Beach
- Marriott properties (all)
- University Club (run by Wedgewood Weddings)

Restaurants

- Andrei's Conscious Cuisine
- Cucina Enoteca
- Dave & Buster's
- Twenty Eight Restaurant & Bar



Resources

- [Events Planning & Covered Services Process Map](#)
- [Covered Services Request Form](#)
- [FM Rental Equipment list](#)
- [Alcohol Policies](#)
- [BFB-BUS 79](#)
- [Entertainment Policies](#)
- [Procurement Services](#)

Frequently Asked Questions



FAQs

If the order is going through FM, why would you need a PO - and share it with Aaron Williams? *If FM will be providing the services, you do not need to generate a PO or work with Aaron Williams. It is when FM cannot support your event and you end up needing to use an outside supplier for any of the covered services.*

Is the University Club considered a non-UCI venue? *Yes, because we don't have operational control.*

Does Beckman Center fall under off-campus? *Yes, because we don't have operational control.*

If we want to order food for an on-campus student event, do we need to check with UCI Catering first or can we go directly to the vendor? *Strictly dropping off food from caterers is allowed and does not fall under covered services. If you require the vendor to serve the food, covered services applies and you must go through UCI Dining Services.*

Are events at the UCI Hospital in Orange considered on-campus? *Yes, covered services applies at any UCI-operated property.*

Does Calit2 fall under off-campus? *No, it's considered to be an on-campus location.*

Do we need to involve Procurement even in the initial facilities use request forms? *No, you are not required.*

FAQs

If our team can set up our own tables and chairs, do we still need to request facilities assistance? *No, however, please be mindful of potential risks involved if an employee gets injured. It's always better to request Facilities Management, when possible.*

What should we do if we receive a reimbursement request when the contract was signed and paid for using personal funds? *Personal funds should never be used, and reimbursement may be denied. Employees should not be signing contracts on behalf of UCI.*

Is The Commons at UCI Research Park considered part of UCI? *No, they are managed by the Irvine Company. The agreement will need to be reviewed through UCI Real Estate Services.*

If UCI Orange/ Medical Center is considered on-site, what is the proper food services we can use? *Please use the food services and cafeteria provided at UCI Orange/Medical Center if the event is located on-site.*

Does the Cove at UCI applied Innovation fall under off campus? *The Cove is considered on campus and covered services do apply.*

How much time is needed for the Procurement team to complete the event agreement? *Minimum of 30 days prior to the need of completion of the agreement.*

THANK
YOU!