



UNIVERSITY
OF
CALIFORNIA

CSU The California
State University

Procuring Success

UC & CSU Procurement Technology Collaboration

Today's Discussion Overview



This session will discuss the procurement technology collaboration between the UC and CSU and how the collaboration will bring a unified approach across the UC and CSU system to sourcing, contracting, supplier management and spend analysis technology.

Goals of the Session



Discuss the need and approach to the collaboration



Outline the anticipated future state of the technology



Explain how the technology has and will be a catalyst for increased collaboration across the two systems.

The need to collaborate

Governor & Legislature challenged all segments to partner for the benefit of all

Fiscal pressures are increasing on all segments

Resources of all segments are limited

Each segment has been working to leverage economies of scale individually

This is a significant step to leverage these economies of scale for all segments

Context on the Collaboration – Why Collaborate



10 Campuses
5 Medical Centers



23 Campuses

Faculty Staff
198,300



Faculty and Staff
50,840

Students
238,700



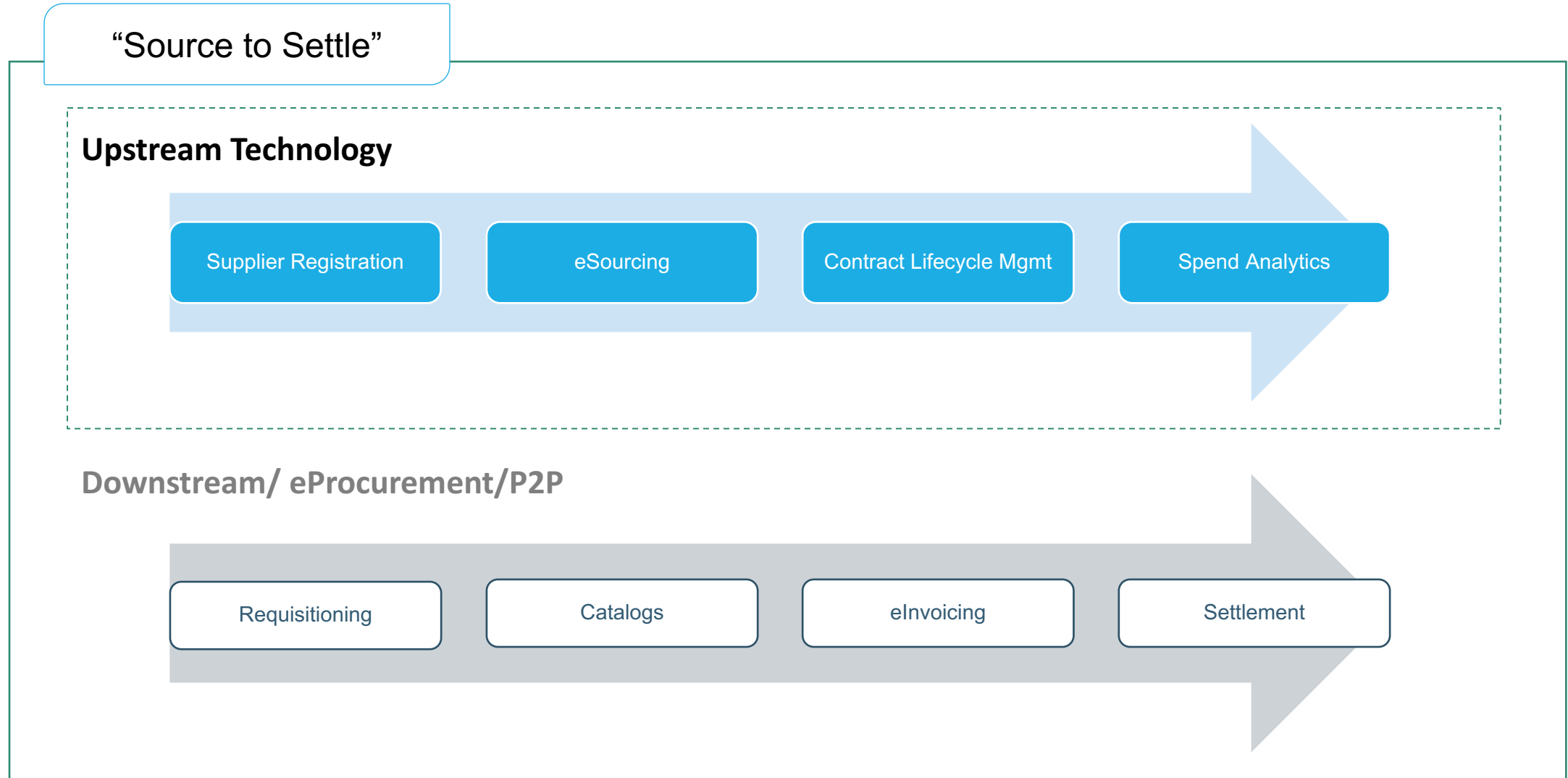
Students
478,638

Spend
~\$8 Billion

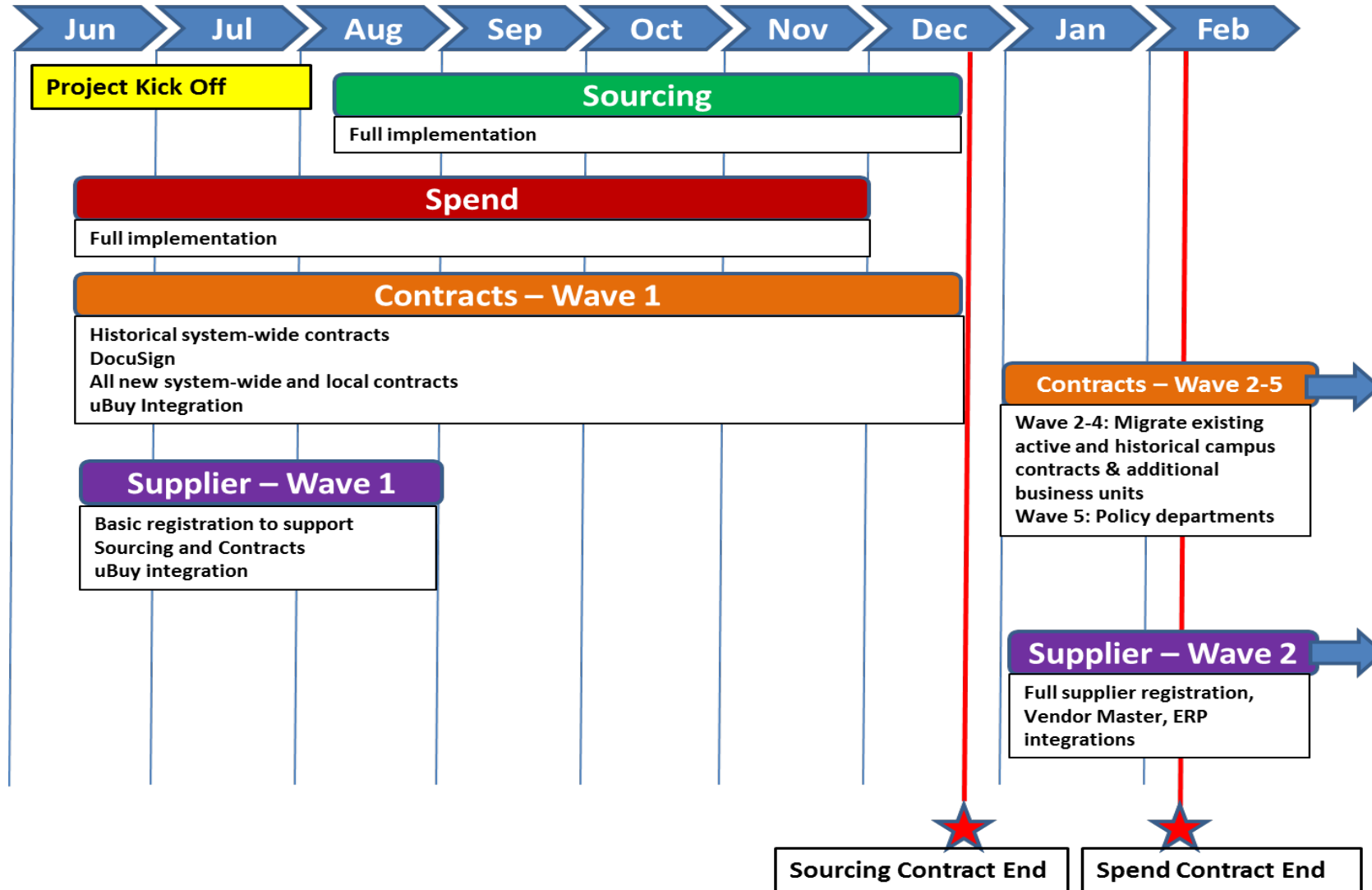


Spend
~1.8 Billion

Scope of Upstream Implementation



Implementation Timeline



UC/CSU Project Approach CPR Model



	UCB	UCD	UCI	UCLA	UCM	UCR	UCSD	UCSF	UCSB	UCSC	UCOP	CSU	CSU	CSU
SOURCING														
CONTRACTS														
SPEND														
SUPPLIERS														

Critical Components to Success:

- Communication
- Buy in
- Decision Making Authority

Project Expectations:

- Campus Input Feedback
- Testing/Data Validation
- Meetings – Weekly or Check In

Role of a Campus Primary Representative

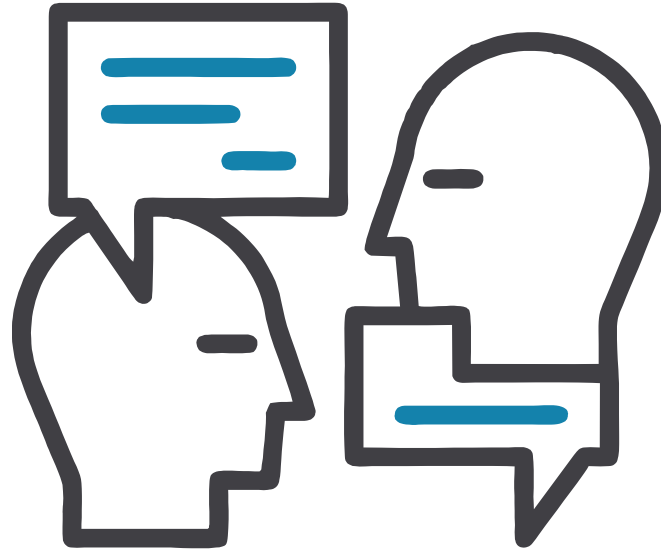
A CPR for Project implementation, does ...



- Represent your UC campus/CSU campuses in all decisions and discussions
- Serve as the campus primary representative (CPR) for the Module
- Attend all required CPR meetings
- Vote on requirements decisions
- Communicate the direction and progress back to your campus – be the local “face” and champion of the project
- Ensure appropriate change management plans are in place to drive adoption for your campus

- **Voting Rights**

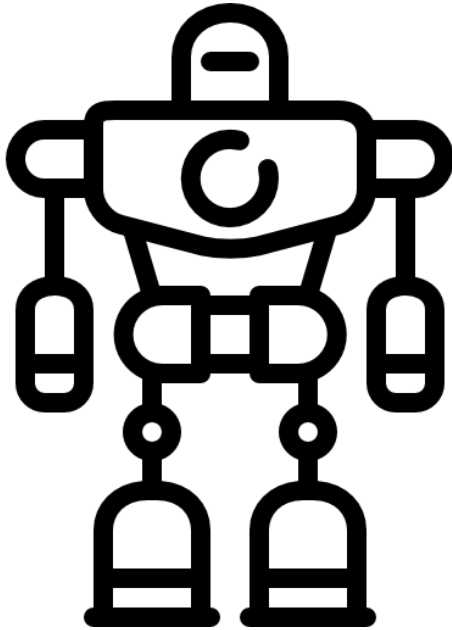
- (1) CPR from each UC campus = 10 total
- (3) CSU CPRs



- **80% Voting Rule**

- **PASS** 80% or more of the votes
- **DO NOT PASS** less than 80% - these will potentially go back to the team for further review, discussion, and refinement

★ Solution must work for both systems ★



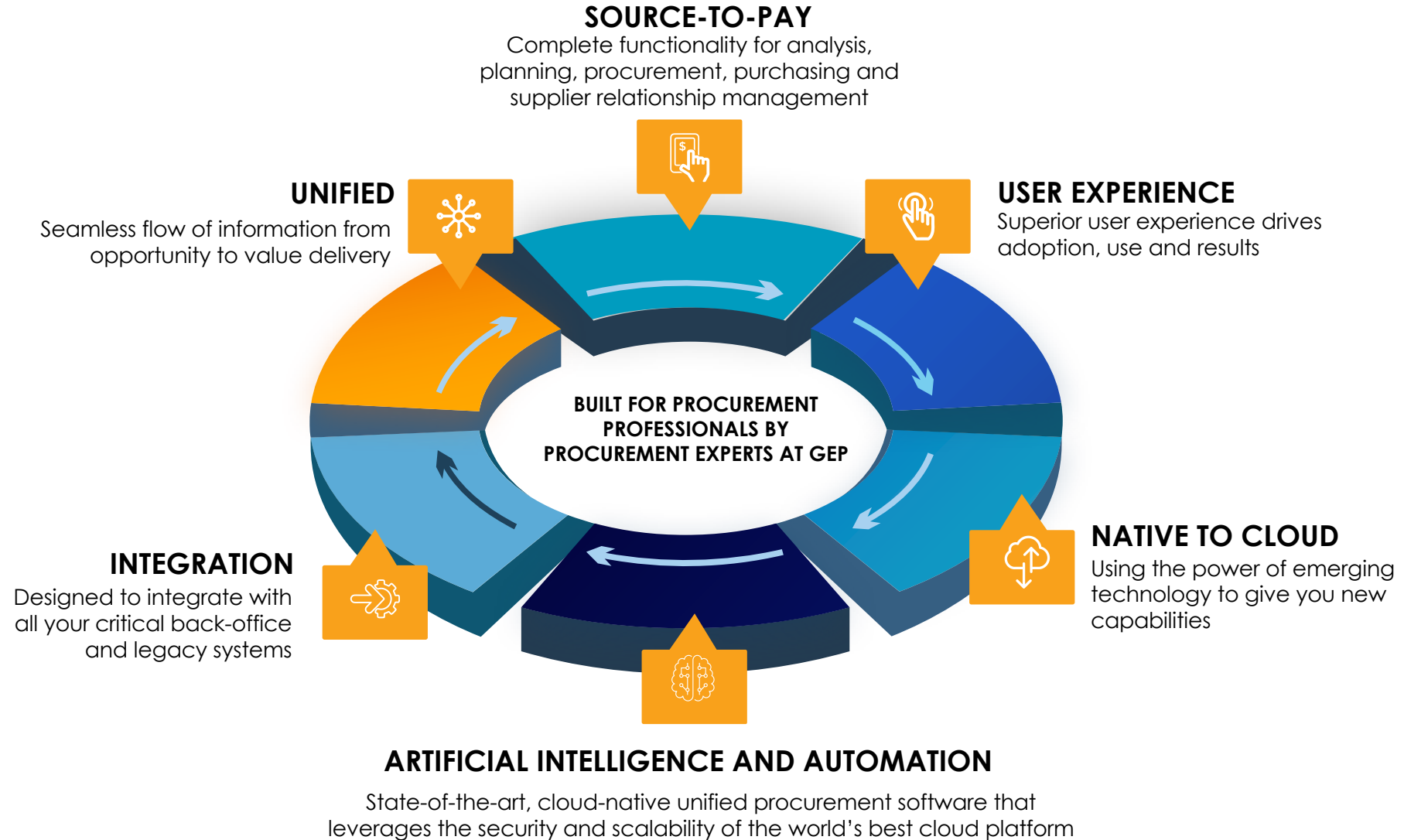
- **Single Upstream Platform**
 - Administration by UC team
 - Ability to see Spend across both systems
 - Create Visibility to activities of both systems
 - Sharing of Contracts
 - Critical foundation for future joint efforts

- **Partnered with GEP**

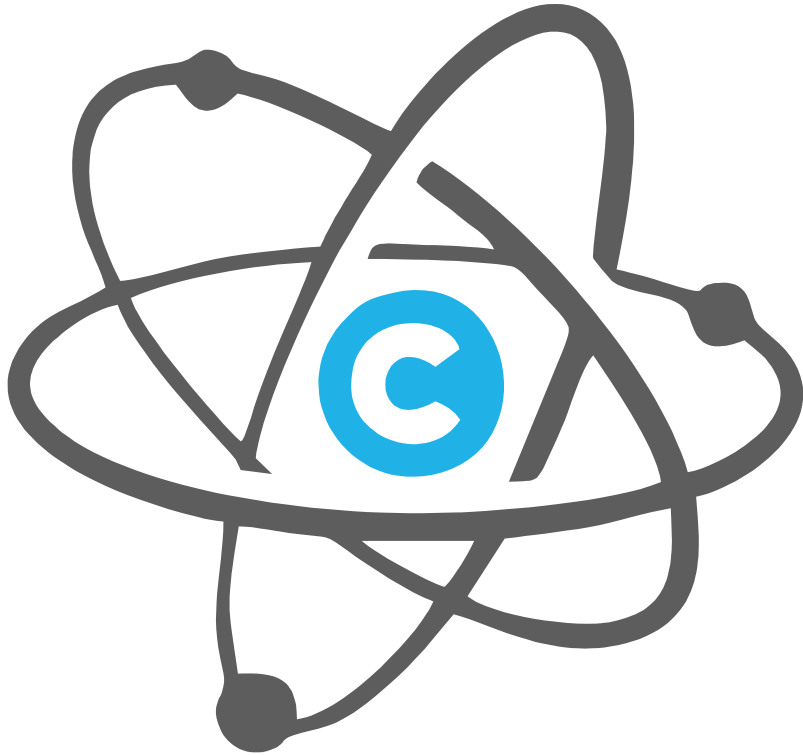
Why we chose SMART by GEP?

RFP overview

- 3 phase, 8 month RFP
- Multiple award scenarios
- 9 responses received; 3 finalists into third phase
- 20+ SMEs from 8 campuses scored
- All 4 modules awarded to GEP



Technology as a Catalyst



Gives CSU ability to leap frog forward with technology, using joint instance and leveraging UC's learnings

Provides UC and CSU Low licensing costs and shared implementation and administrative resources resulting in lower total cost of ownership (TCO) model for both systems

Shared instance delivers visibility that lays the groundwork for future sourcing & contracting collaboration, including more rapid transfer of learnings and best practice sharing across systems

Key Take Away's from the Collaboration



Collaboration is difficult and requires flexibility on all parties behalf



Communication is key to ensure all stakeholders are fully informed of the process, both internal (CPR's) and broader University Community



Establishing roles and responsibilities upfront allows for positive and constructive interaction amongst team members



Developing regular cadence for meetings, decisions and document distribution is critical to allow CPR's to successfully interact with their stakeholders

QUESTIONS?

THANK YOU