
UNIVERSITY
OF
CALIFORNIA

UC PROCUREMENT

January 27, 2023

CHANCELLORS
ACADEMIC COUNCIL CHAIR COCHRAN
LABORATORY DIRECTOR WITHERELL
ANR VICE PRESIDENT HUMISTON

Re: Systemwide Review of Proposed Presidential Policy BFB-BUS-43 Purchases of Goods and Services; Supply Chain Management

Dear Colleagues:

Enclosed for systemwide review are proposed revisions to Presidential Policy BFB-BUS-43 Purchases of Goods and Services; Supply Chain Management.

UC Systemwide Procurement, in consultation with UC campus Supply Chain Management and Procurement staff as well as campus policy managers, has revised the language in BFB-BUS-43 Purchases of Goods and Services; Supply Chain Management (BUS-43). This revision is to clarify policy requirements, address inconsistencies and formatting errors, and separate policy from procedure.

BUS-43 was last reviewed in 2021, and feedback from stakeholders indicated that BUS-43 was difficult to understand and didn't adhere to current best practices regarding Presidential Policies. This revision addresses that feedback in the following ways:

- **Respond to feedback from the previous systemwide review.** During the 2021 systemwide review of BUS-43, multiple commenters noted that BUS-43 was difficult to understand, and the language didn't match best practices for Presidential Policies. As a result, BUS-43 has been rewritten using natural language rather than jargon whenever possible.
- **Address inconsistencies and formatting errors.** The last full review of BUS-43 was in 2012, and over time subsequent revisions introduced formatting errors such as incorrectly numbered sections and inconsistent styles within each section. This revision corrects those errors and applies a consistent style throughout the policy. This revision also updates BUS-43 to match current Presidential Policy guidelines.
- **Clarify what policy does and does not allow.** BUS-43 currently uses "should" and "should not" in policy requirements. This has caused confusion in determining what are policy requirements vs what is recommended or allowable. The BUS-43 revision clarifies what are policy requirements ("must" or "must not" do), what is or isn't allowed ("may" or "may not" do), and what is recommended as best practice for procurement at the University of California.
- **Separate policy from procedure.** BUS-43 currently contains both policy and procedures for Procurement. The procedures are not required policy, and therefore don't belong as part of BUS-43. The BUS-43 revision contains just the policy and required procedures. The remaining procedures will be moved to the Systemwide Procurement online portal as guidelines for faculty, students, and staff who participate in the procurement process at the University of California.

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The revision does not change the intent or requirements of BUS-43. The new language is designed to help faculty, students, and staff understand what the policy requirements are. However, the revision is extensive and therefore does need a systemwide review to ensure all stakeholders have a chance to comment on the changes.

Policy Drafters and Reviewers:

- Policy Communication and Training Analyst, Systemwide Procurement
- Campus policy managers
- Executive Director for Strategic Sourcing, Systemwide Procurement
- UC Legal
- Chief Procurement Officer, Systemwide Procurement
- Procurement Policy & Legal Document Team
- Campus Procurement Card Administrators
- Procurement Leadership Council
- Policy Advisory Committee

Sections Changed

No policy revisions were made, but each section of BUS-43 was rewritten to clarify policy and correct formatting errors. In addition, the Procedures section was significantly shortened to reflect just the required procedures. The procedures removed from BUS-43 will be moved to the Systemwide Procurement online portal.

Key Policy Issues Addressed

- **Clarification of Existing Policy** – this revision makes BUS-43 easier to understand with the goal of increasing compliance. This revision also responds to stakeholder feedback for policy written in natural language rather than jargon.

Systemwide Review

Systemwide review is a public review distributed to the Chancellors, the Chair of the Academic Council, the Director of the Lawrence Berkeley National Laboratory, and the Vice President of Agriculture and Natural Resources requesting that they inform the general University community, especially affected employees, about policy proposals. Systemwide review also includes a mandatory, 90-day full Senate review.

Employees should be afforded the opportunity to review and comment on the draft policy. Attached is a Model Communication which may be used to inform non-exclusively represented employees about these proposals. The Labor Relations Office at the Office of the President is responsible for informing the bargaining units representing union membership about policy proposals.

We would appreciate receiving your comments no later than **April 27, 2023**. Please submit your comments via online form: [BUS-43 Feedback Form](#)

Sincerely,
DocuSigned by:

Paul Williams

Paul Williams, Systemwide Procurement
Associate Vice President & Chief Procurement Officer

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Enclosures:

- 1) Draft Presidential Policy BFB-BUS-43 Purchases of Goods and Services; Supply Chain Management (clean copy)
- 2) Draft Presidential Policy BFB-BUS-43 Purchases of Goods and Services; Supply Chain Management (tracked changes copy)
- 3) Model Communication

cc: President Drake

Provost and Executive Vice President Newman
Executive Vice Chancellors/Provosts
Executive Vice President and Chief Financial Officer Brostrom
Executive Vice President and Chief Operating Officer Nava
Executive Vice President Byington
General Counsel and Senior Vice President Robinson
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