UCLA Procurement Solutions Group

O.T. Wells II
Chief Procurement Officer
Procurement Solutions
Group
April 8, 2021
My Background

Chief Procurement Officer
2020
Georgetown University
Washington, DC

Chief Procurement Officer
2015
American International Group, Inc. (AIG)
New York, NY

Vice President/Global Head of Business Operations Services Sourcing
Bank of America/Merrill Lynch (BAC)
New York, NY

Vice President/Business Controls
Merrill Lynch
New York, NY

O.T. WELLS II
CHIEF PROCUREMENT OFFICER
Small Business and Sustainability
owells@finance.ucla.edu

PASSIONS

EDUCATION

Georgetown University, J.D., Law
Morehouse College, B.A. Political Science
Subcontract Support

Linda Chen – Subcontracts
Alex Rico – Purchase Orders

SUBCONTRACTS OVERVIEW
CREATING AND CLOSING OUT SUBCONTRACTS
SMALL BUSINESS SUBCONTRACTING
VISION & MISSION

Valued procurement advisor providing a PATHWAY TO YES for the UCLA community

VALUES

We are…STRATEGIC & INNOVATIVE
We…PRIORITIZE, BUILD RELATIONSHIPS, DELIVER RESULTS

“We do this by creating innovative sourcing, payables and revenue-generating solutions while mitigating risk to the University.”
Students and faculty are more socially conscious than ever, UCLA must shift towards a sustainable supply chain or risk growth due to inaction.

Procurement with Purpose approach will boost resilience, from both a profit and planetary perspective.

Move beyond simply monitoring supplier compliance, to actively collaborating with suppliers on initiatives to improve environmental, social, and economic performance.
Our Approach

1. **Execute**
   Execute measures that lead to preparedness.

2. **Enable**
   Enable innovation, agility and supply reliability.

3. **Access**
   Access advanced analytical tools, raising data-driven decision making.

4. **Transform**
   Transform from transactional to strategic: influencing how campus purchases goods and services.
Sourcing Best Practice Process

**Bid Release**
- Participate in strategy, RFP, or auction events
- Identify all necessary internal approvals
- If project is sole source, execute a Sole Source justification

**Contract Negotiation**
- Conduct contract negotiations
- Coordinate Legal, IT, Risk participation as needed
- Conform to Federal and State laws, and UC Policy

**Sustain**
- Collaborate with strategic suppliers to align priorities
- Mentor small businesses to ensure access to contracts
- Engage PSG and legal for disputes, changes, or terminations
- Actively manage vendor relationship

**Contract Management**
- Educate stakeholders on contracts and products that meet UC sustainability standards
- Support buying practices that align with sustainability goals
- Leverage eProcurement tools to flag products
- Ensure completeness of contract documentation
- Confirm receipt of goods and/or services and review and approve invoices to effect payment

**Project Scoping & Bid Development**
- Define and document requirements, milestones, and agree on timeline with PSG
- Develop sourcing strategy, RFP or Auction events
- Analyze commodity/vendor spend
- Determine/finalize list of potential suppliers
- Consider supplier diversity opportunity

**Bid Evaluation**
- Evaluate vendor responses
- Start the internal approval process
- Review negotiation terms and priorities with the negotiation lead
- Develop vendor selection criteria
Purchase Order Volume
Green Spend

Current Cleaning Supplies Green Spend

Cleaning Supplies Green Spend - FY19 and FY20 Comparison by %

Cleaning Supplies Green Spend - FY19 and FY20 Comparison by $
Current EaSR Spend 8% ($130M) vs. 25% Goal
Innovation

• Implementing PaymentWorks vendor onboarding tool enabling a simpler, faster way to get vendors into our system.

• Implementing DocuSign Contract Lifecycle Management, providing transparency into the contract/PO process.

• Working with vendors (Office Depot, Amazon, Dell) to update catalogs to prioritize green products and/or small business when searching for products to purchase.
Thank You

Questions?