

January 17, 2024

Andrea Kasko, Chair
Academic Senate

Re: Proposed Revisions to UCLA Policy 740: Purchasing Goods and Services

Dear Chair Kasko,

At its meeting on December 4, 2023, the Council on Planning and Budget (CPB) discussed the Proposed Revisions to UCLA Policy 740: Purchasing Goods and Services. Members expressed disappointment over the lack of progress the administration has made toward simplifying and streamlining purchasing processes, as evidenced by the proposed revisions to the policy. There was unanimous agreement that the policy should not go forward until the Procurement Steering Committee, chaired by a CPB member, has had an opportunity to discuss it, offer comments, and determine whether it makes sense. Members agreed that the burden added to faculty and staff by this policy is significant and should be addressed, and expressed bafflement as to why everyday activities and purchases are so heavily regulated. Many expressed that the risks posed by certain purchases targeted by the policy are negligible, while the bureaucratic burden imposed by their enforcement is significant.

Members offered the following additional comments.

1. Many hyperlinks on the policy document are broken.
2. It appears that there are some errors in the details of the policy outlined in Attachment A. It is unclear, for instance, how it would even be possible to obtain a requisition for a meal or light refreshment, and the text of BUS-79 linked in the document does not appear to indicate that a requisition will actually be required going forward for either of these things.
3. Members wondered how the term 'extravagant item' was defined, especially in describing technological devices and equipment routinely used to perform functions necessary to faculty members' everyday work. What is the definition of an item 'known for the brand,' and how can the administration be sure that items made by particular companies known for producing those items will not have unique functionality critical to faculty teaching and research? This is certainly the case with iPads, for instance, the purchase of which is explicitly banned. Members recommended removing the entire section.
4. Members observed that reimbursements of payments to foreigners are "disallowed," but that travel advances are not provided. For faculty who routinely perform work overseas, how are they to pay people who help on projects?

5. Members commented that time is wasted processing payments and suggested that the policy include a commitment to focus on increasing the efficiency of payment processing.
6. Members find the distinction between a P-card \$5,000 maximum purchase and a \$10,000 low value order purchase to be illogical.

If you have any questions for us, please do not hesitate to contact me at emmerich@humnet.ucla.edu or via the Council's analyst, Elizabeth Feller, at efeller@senate.ucla.edu.

Best regards,

Michael Emmerich, Chair
Council on Planning and Budget

cc: Kathleen Bawn, Vice Chair/Chair-Elect, Academic Senate
Jessica Cattelino, Immediate Past Chair, Academic Senate
April de Stefano, Executive Director, Academic Senate
Elizabeth Feller, Associate Director, Academic Senate
Members of the Council on Planning and Budget