

February 23, 2024

Allison Baird-James
Interim Vice Chancellor and Chief Financial Officer, UCLA

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

Dear Vice Chancellor and Chief Financial Officer Baird-James,

At the February 15, 2024, meeting of the Executive Board (EB), members reviewed the Proposed Revisions to UCLA Policy 740: Purchasing Goods and Services as well as the attached divisional committee and council responses.

Members voted unanimously in favor of a motion to decline to endorse the proposed revisions to UCLA Policy 740 due to the fundamental disconnect between what the policy tries to accomplish and the way people work at university, and to strongly recommend a redefining of the policy that supports the academic mission, which will require more faculty feedback to reshape the proposal.

Members affirmed the principle that purchasing must support the academic mission of the university. Specifically, purchasing should facilitate the research and teaching of the faculty. Currently, faculty experience purchasing practices as an obstacle and purchasing policy as one that appears designed to protect the university from auditors, attempt to fix IT security concerns, or try to save money rather than to support faculty. As a result, members suggested that current purchasing policies and practices push the labor costs onto departments and faculty who have to spend more time to convince administrative staff of the legitimacy of their purchases. Members asked, for whom is it efficient? It appears that the direction of purchasing is to make it easier for administration and compliance, but not for departments and faculty.

Members urged an intentional and sustained effort by Administration to understand and address the challenges faced by faculty in order to refocus the policy to support the academic mission. Some ideas included a town hall to hear faculty concerns, active and sustained engagement with the Procurement Advisory Steering Committee (whose faculty members reported not seeing this proposal), and reinvigorated consultation with the Council on Planning and Budget.

Members recounted numerous experiences where the current and proposed policy on purchasing hampers their research and teaching:

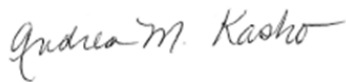
- the challenge of obtaining receipts for reimbursement when conducting research abroad where currently defined “extravagant expenses,” “gifts,” and “foreign payments” are par for the course for field work in a rural African country;
- the absurdity of considering an iPad as an “extravagant” item for data collection and teaching when the device is convenient and easy to use;

- the significant lag time between planning and reservations for international travel where the university will not pay the T&E Card, leading to late fees;
- the onerous approval process to justify purchase of specialized software for research, resulting in the faculty member paying out of pocket;
- And the challenge of explaining to purchasing staff the difference between a royalty and licensing fee for using an image in a scholarly publication.

In sum, members requested a close review of the enclosed feedback and also sustained engagement with faculty to develop a revised policy that centers the academic mission, which will ultimately reduce costs and increase efficiency in a way that truly supports research and teaching.

The UCLA Academic Senate appreciated the opportunity to advise on this important issue.

Sincerely,



Andrea Kasko
Chair
UCLA Academic Senate

Encl.

Cc: Kathleen Bawn, Vice Chair/Chair Elect, UCLA Academic Senate
Jessica Cattelino, Immediate Past Chair, UCLA Academic Senate
April de Stefano, Executive Director, UCLA Academic Senate
Darnell Hunt, Executive Vice Chancellor and Provost, UCLA
Anna Joyce, Director of Administrative Policies and Strategic Initiatives, UCLA Administrative Policies and Compliance Office
Emily Rose, Assistant Provost and Chief of Staff to the EVCP, UCLA