

Sourcing + ePro = Success: Collaborating with eProcurement to Enhance Your RFX

UC PROCUREMENT EVENT
Procurement OnStage

UC PROCUREMENT

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University of California - Office of the President Systemwide Procurement



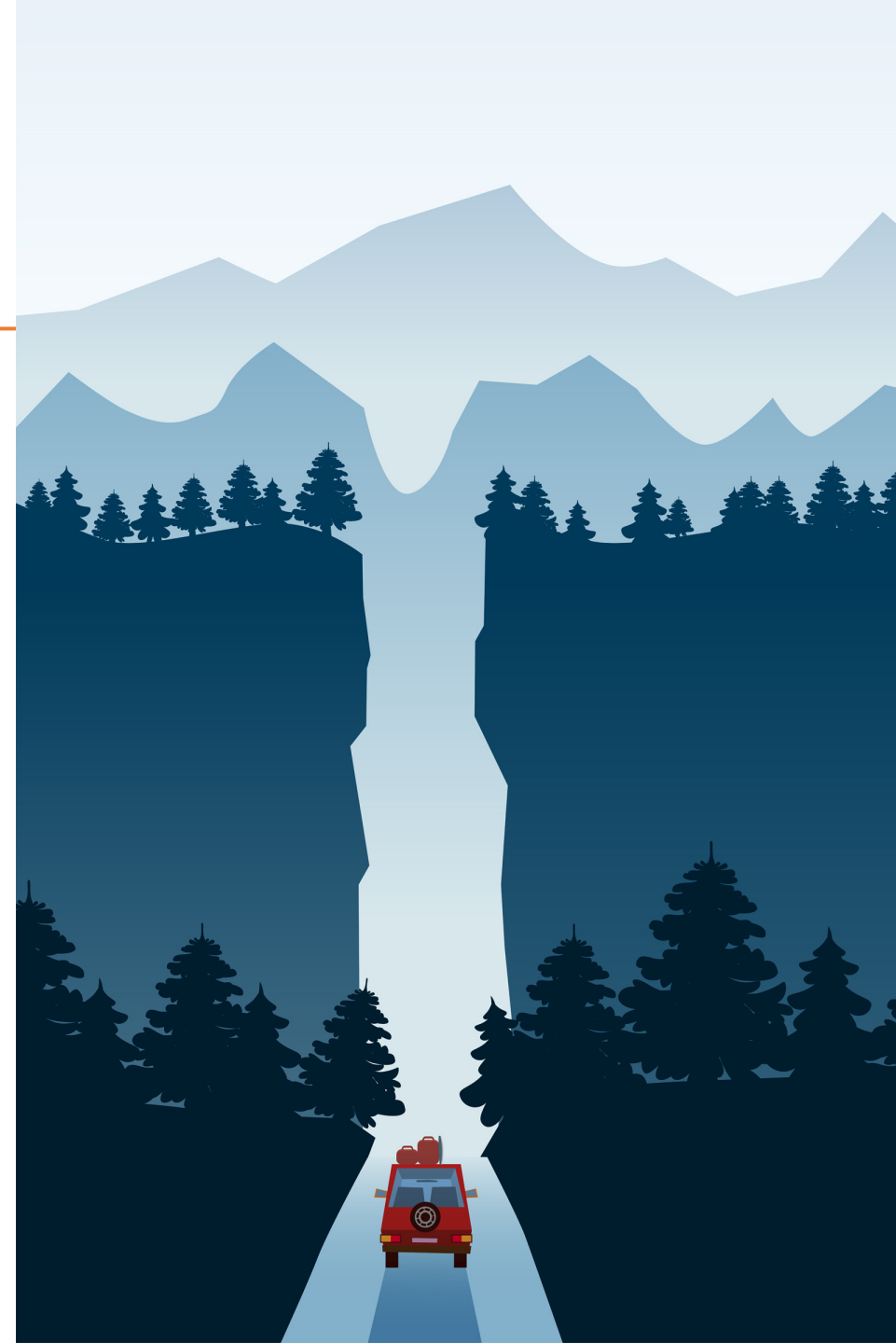
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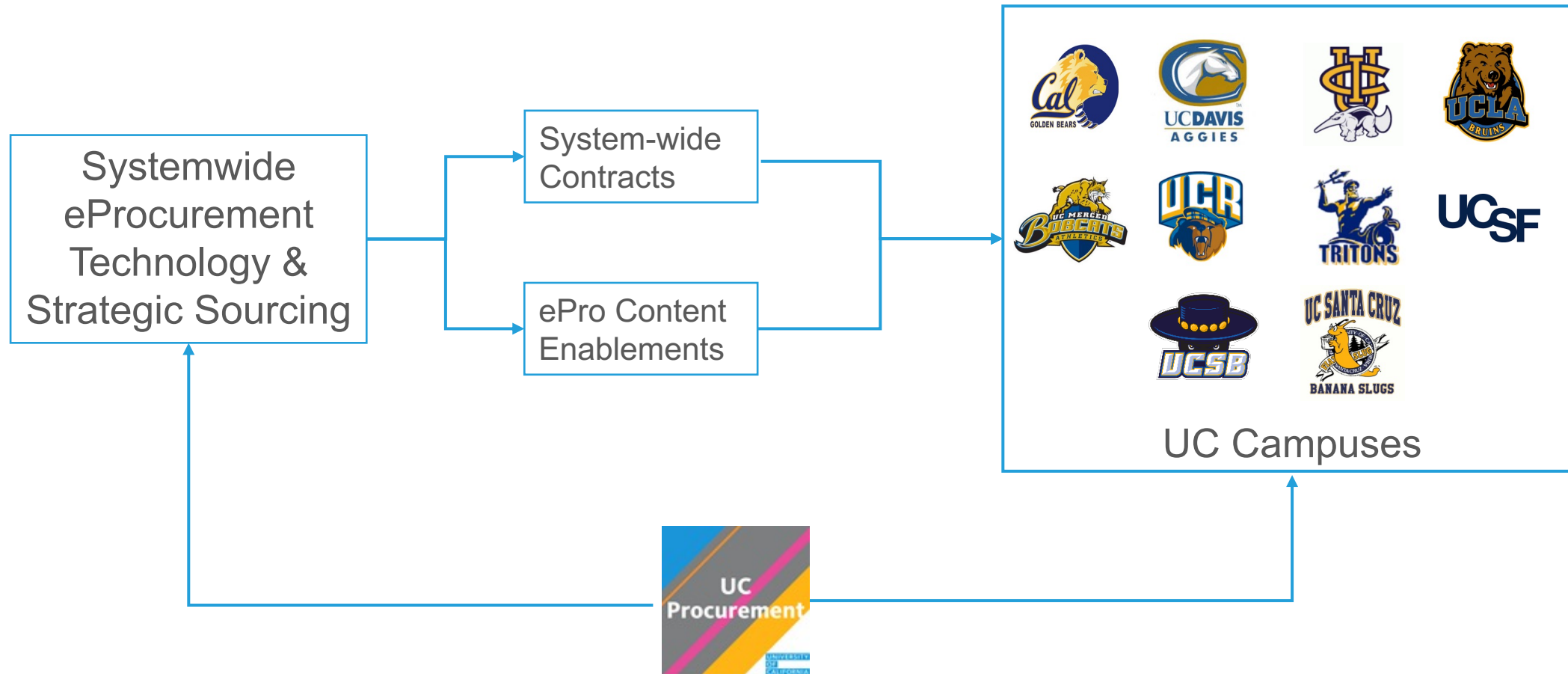
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Our Journey for Today...

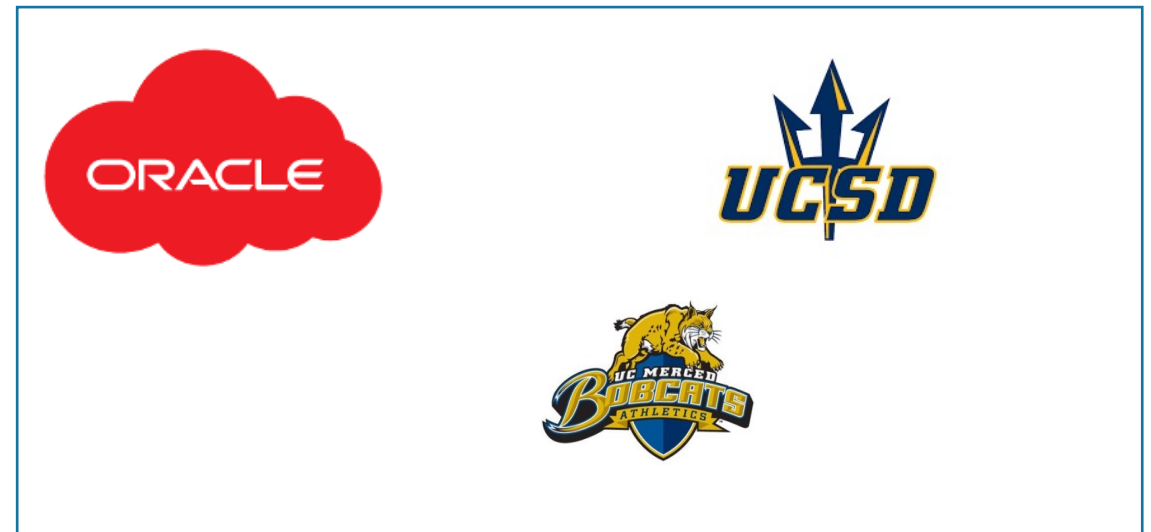
- System-wide Contract Implementation/Utilization
- ePro Meets RFx
- Walk the RFx Walk
- Lessons to Share
- Discussions



How UC Systemwide Strategic Sourcing Works....



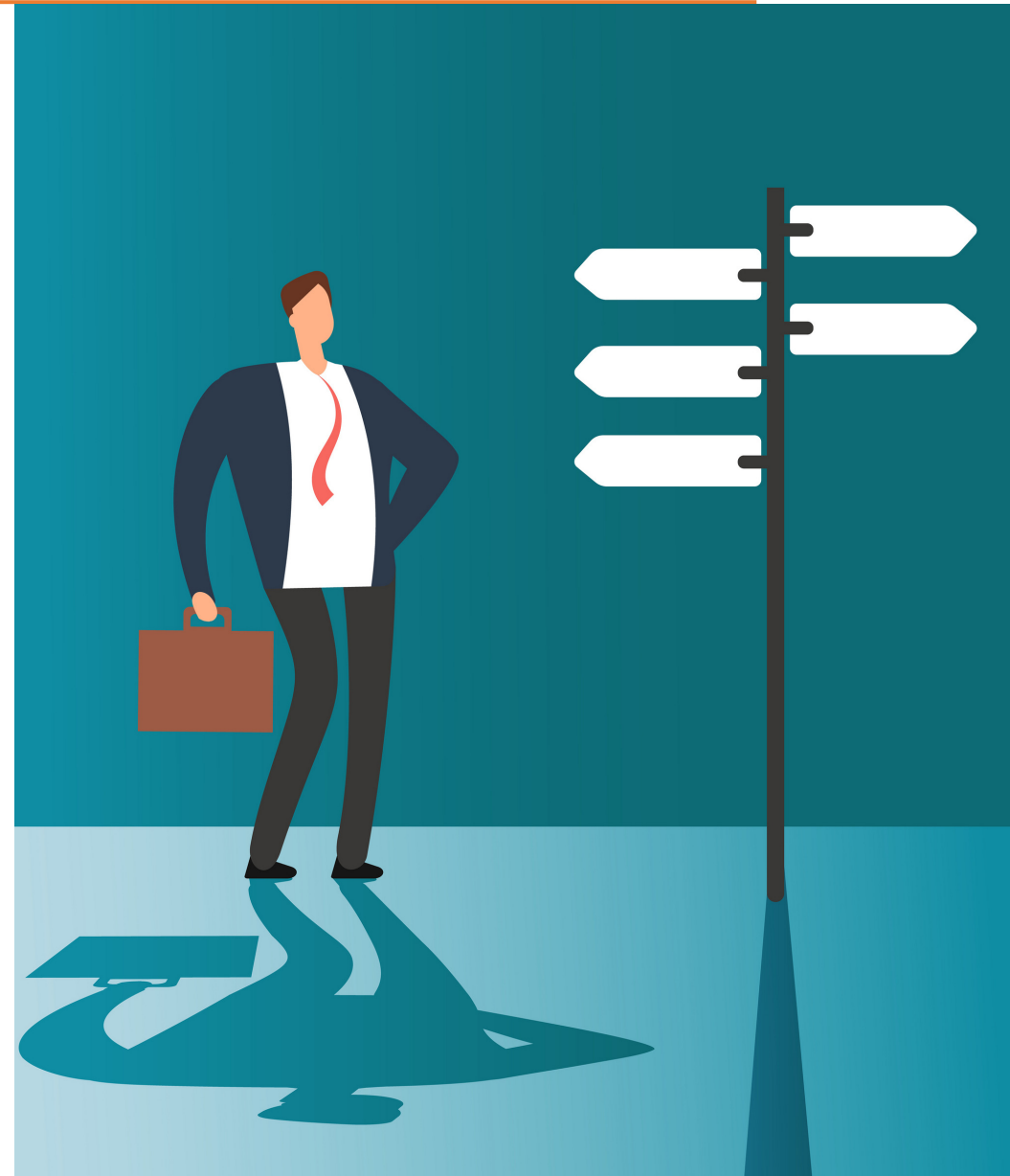
Current UC ePro Landscape



Why we chose this path

Challenges with System-wide Contracts

- Inability to effectively manage supplier content
- Difficulty supporting UC-wide initiatives and strategies
- Low contract utilization
- Suppliers unable to support all of our platforms (Jaggaer, Proactis, Oracle)



Why we chose this path

Examples

- IT Contract awarded, despite e-Pro capabilities not meeting campus needs
- F&C Contract awarded to furniture manufacturers with no e-Pro capability
- Challenged in achieving sustainability goals due to lack of item flagging to guide buyers



Our first opportunity

- UC Systemwide Office Furnishings RfX
- Scope: Systemwide furnishing - not residential
- Annual spend: \$55.8 M/year



Our first opportunity

ePro Benefit for this Commodity:

- Pre-approved catalog for individual items with high volume, recurring purchases
- More efficient quoting/purchasing
- Large project quotes
- Campus standards, uniformity and product blocking



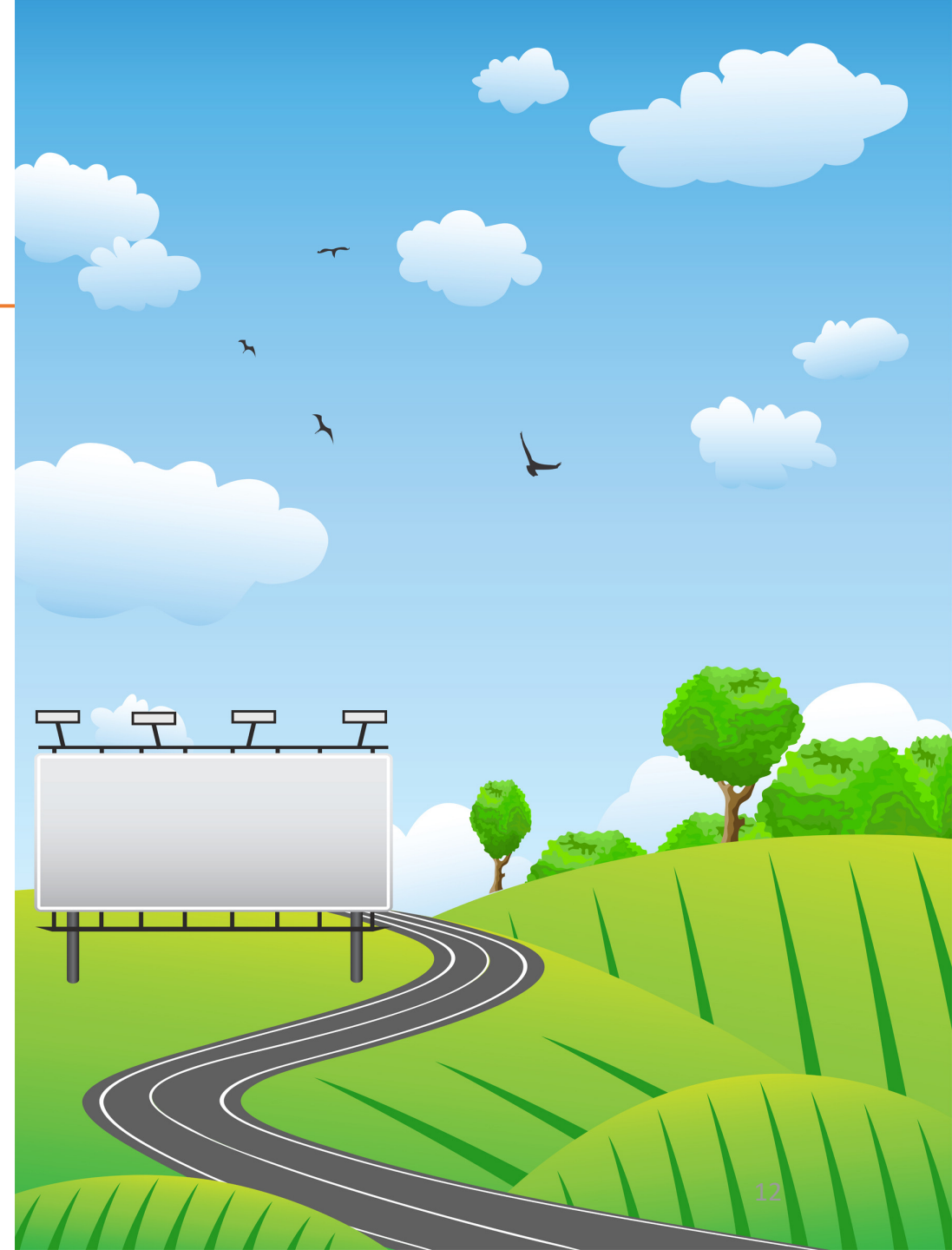
Why it was a good fit



- Invited to the table by the sourcing project manager
- Involved both an RFI and RFP
- Diverse team structure focus: sustainability, pricing, design, ePro, etc.
- High % of spend through ePro
- Allowance: Suppliers given 18 months to become ePro enabled

The Journey

1. Formed an ePro sub-committee
2. Two-way learning experience
3. Confirmed ePro questions before RFI
4. Met independently and as an overall RFX group
5. Revised ePro questions between RFI & RFP
6. Compromised / Negotiated on score weighting



What it takes....

Pre-RFx

- Pre-defined ePro strategy
 - Understand current buying process
- Knowledge of ePro needs
 - Content management
- Collaboration across many teams (communication)



What it takes....

RFX and beyond

- Suppliers' IT groups required to participate in response to RFX
- Additional communication regarding requirements
- Experienced ePro SMEs



Lessons Learned & Improvements Made



- Large Project challenges - RFI & RFP
- Spreading the fun – involving Campus ePro & guided scoring for the team
- Start with commodity agnostic questions & build
- Synergies between functional areas

Shared Toolkit

Downloadable Templates (also available in CalUsource)

- [UC eCommerce Appendix](#)
- [UC eCommerce RFX Questions](#)
- [UC Sustainability and Supplier Diversity RFX Questions](#)



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Appendix A: UC eCommerce RFX Question Categories

These are the categories and summary of the questions that the UC asks in an RFX, where it is determined that the commodity will be available in the Campus eCommerce systems.

Category	ePro Question Summary	Nbr of Questions
eCommerce Platform: System, support & overall functionality	Company or 3rd Party ePro, Types of catalogs supported, Technical Questions, Current & Future capabilities	8
eCommerce Platform: Specific functionality	Quote and Configurable item functionality	7
eCommerce Platform: Item Identification	Product Filtering, Blocking & Flagging, UNSPSC Code	10
System Security and Disaster Planning	eCommerce System Security and Disaster Planning & Recovery	2
eCommerce Platform: Invoicing & Payments	Invoicing Methods, Payment Types and 3rd Party Services	4



Appendix B: UC eCommerce Appendix Overview

This Electronic Commerce (eCommerce) Appendix specifies the electronic commerce requirements applicable to Supplier in providing the Goods and/or Services.

SECTION 1 - GENERAL TERMS: Overview of UC eCommerce environment

SECTION 2 – DEFINITIONS: Terms used in document and common eCommerce terms

SECTION 3 – RIGHT TO USE: UC grants to Supplier the right to sell Goods and/or Services

SECTION 4 – e-PROCUREMENT SYSTEM RESPONSIBILITIES; MAINTENANCE OF CATALOG(S):

- a) e-Procurement System Responsibilities
- b) Maintenance of Hosted and Punch-out Catalogs
- c) License
- d) Accessibility Requirements

SECTION 5 – USER SUPPORT: Support structure & responsibilities for UC and Supplier

SECTION 6 – PROPRIETARY RIGHTS: Rights, licensing, Trademarks, and Intellectual Property

SECTION 7 – MULTIPLE SUPPLIERS: UC may enter into similar agreements with other suppliers

SECTION 8 – WARRANTY DISCLAIMER

SECTION 9 – DISPUTES AND CHANGES IN THE SERVICES:

Negotiate in good faith. Changes mutually agreed upon

SECTION 10 – ADDITIONAL CONTRACTUAL TERMS:

- a) Types of Catalogs: hosted or punch-out
- b) Number of annual catalog updates, if hosted
- c) Number of annual price changes
- d) Number of items allowed in the catalog
- e) Categories allowed and blocked within catalog