



If you could swap jobs for a day, what would you do?

UC Systemwide Procurement Team Meetings

First Fridays

June 5, 2026



First Friday Agenda

TOPIC	TIMING	PRESENTERS
Welcome	5 min	Paul Williams
Celebrations	5 min	Matt Romano
Kudos	10 min	Bara Waters
Recognition of the Month	5 min	Sean Parker
News Updates Staff Announcements	5 min	Dr. Ola Popoola
Project Spotlight – US Bank Card Program	10 min	Sean Parker
Special Feature – SWP Procurement Academy	15 min	Diane Solinger & Nik Goodyear
UC Procurement Impact	2 min	Bara Waters



Celebrations

June Birthdays

Virginia Ling – June 6

Matt Romano – June 13

Abim Odusoga – June 28

Debra Almason – June 29

(Patricio Simpson – July 2)



June SWP/UCOP Happenings



June 2026

[SWP & Campus Events](#)
[UCOP Oakland Events](#)



June | Entire Month
[Pride Month](#)
(Video)



Wed, Jun 10 | 1-2:30 pm
PRIDE Ice Cream Social
5th Floor Outdoor Patio (Oakland)

Using Atlassian JIRA for Work Management: Office Hours

June | Every Wed, 12-1 pm
[JIRA Office Hours](#)
(Rm 6411 Oakland / Zoom)



June 8 & 25 | 10 am
[Benefit Bank Office Hours](#)
(Benefit Bank | Zoom)



Mon, June 8 & 22 | 11 am
[Procurement Connections](#)
(Zoom)



Fri, June 19 | All day
Juneteenth
(UC Holiday)

Kudos & Shout-outs

Acknowledge a colleague or team for going the extra mile!

- collaborated on a project
- met a tight deadline
- jumped in to help
- shared an idea for improvement
- ...and more!

Enter their **name** and **action** in the Chat...



Kudos & Shout-outs



From Karen Rhee | Director, Procurement Systems | SWP:

To recognize incredible teamwork demonstrated by Kevin, Neil and Sneha!



Kevin Pham

When UCI spend files did not post properly, Kevin took swift action (despite being OOO) to figure out the problem and coordinated with Neil to follow through.



Neil Kronenthal

Neil stepped in to post the UCI files to the FTP site.



Sneha Thomas

Came to the Systems team rescue by proactively addressing several tickets not assigned to her while Karen was away to ensure continuity of support.

Kudos & Shout-outs



From Bob Stueber | Strategic Partnerships Manager | SWP:

- ★ **Kevin Pham:** Strong shout-out for outstanding responsiveness and coordination during Source-to-Contract Six Solutions RFP. He quickly engaged multiple suppliers simultaneously and ensured they were successfully onboarded into CalUSource, helping maintain momentum and keeping the process on track. His integrity throughout the process stood out and his accountability and consistency built trust and kept everything moving smoothly.



Special Recognition Recipient

Criteria for Special Recognition*



Exemplifies SWP Values

- Compassion
- Empathy
- Curiosity
- Integrity
- Empowerment
- Honesty
- Trust



High Impact Work

Delivered high impact work that directly relates to one or more SWP Strategic Pillars



Above and Beyond

Demonstrated work above and beyond scope of regular work



Stepped Up

Stepped up to address something emergent and challenging

**Plus, hasn't been recognized in the past quarter*

Special Recognition



Bob Stueber

Exemplifies
SWP Values:

Empowerment

- **Monumental task in covering for RevGen operations in Sean Parker's absence.** (There's enough work for 3 full-time people.)
- Great ability to identify creative opportunities and flag risks. Also, appreciate his caution to implement projects with little impact or false promise.
- Covered for partnership elements in many existing contracts, including the LAMP contracts. Helped and educated multiple colleagues across COEs.
- For 5 months, Bob took on very large and complex portfolio that would have faltered or stalled in Sean's absence.
- Appreciate his ability to be nimble, build relationships, and make our work more impactful.

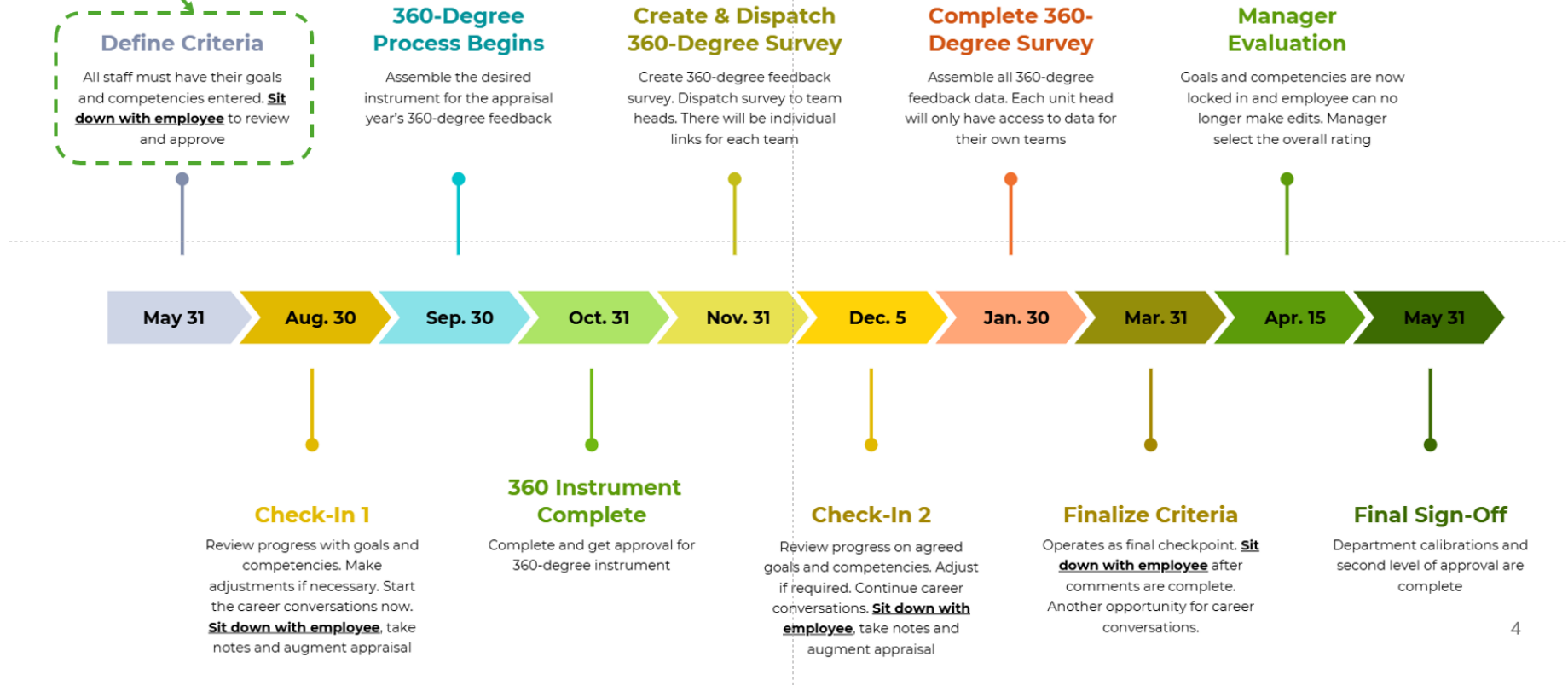


News | Updates | Staff Announcements

Starting 2026-27...

We are here!

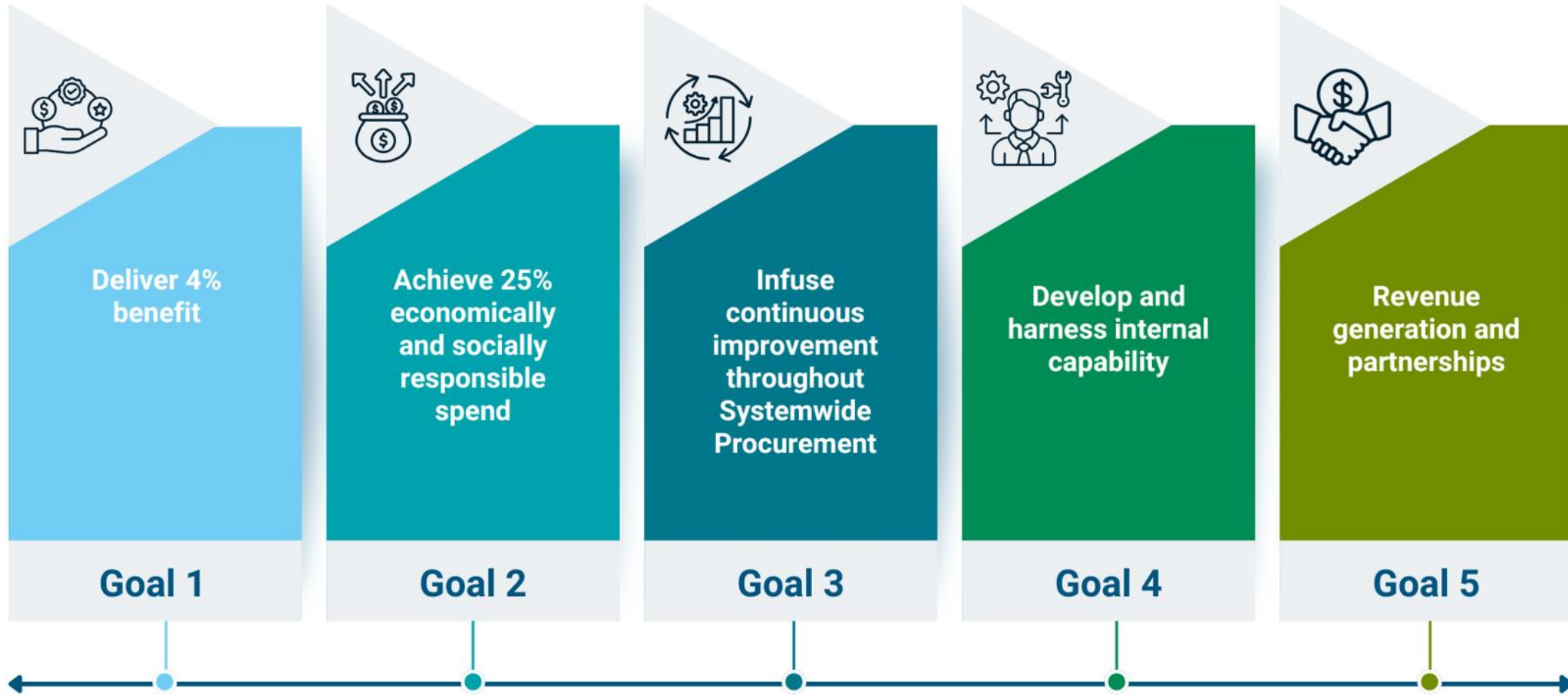
Detailed SWP Appraisal Timeline



- New goals for 2026-27 due **May 31**.
- Remember that SWP is moving to a deliverables-based model for our goals (see next two slides)

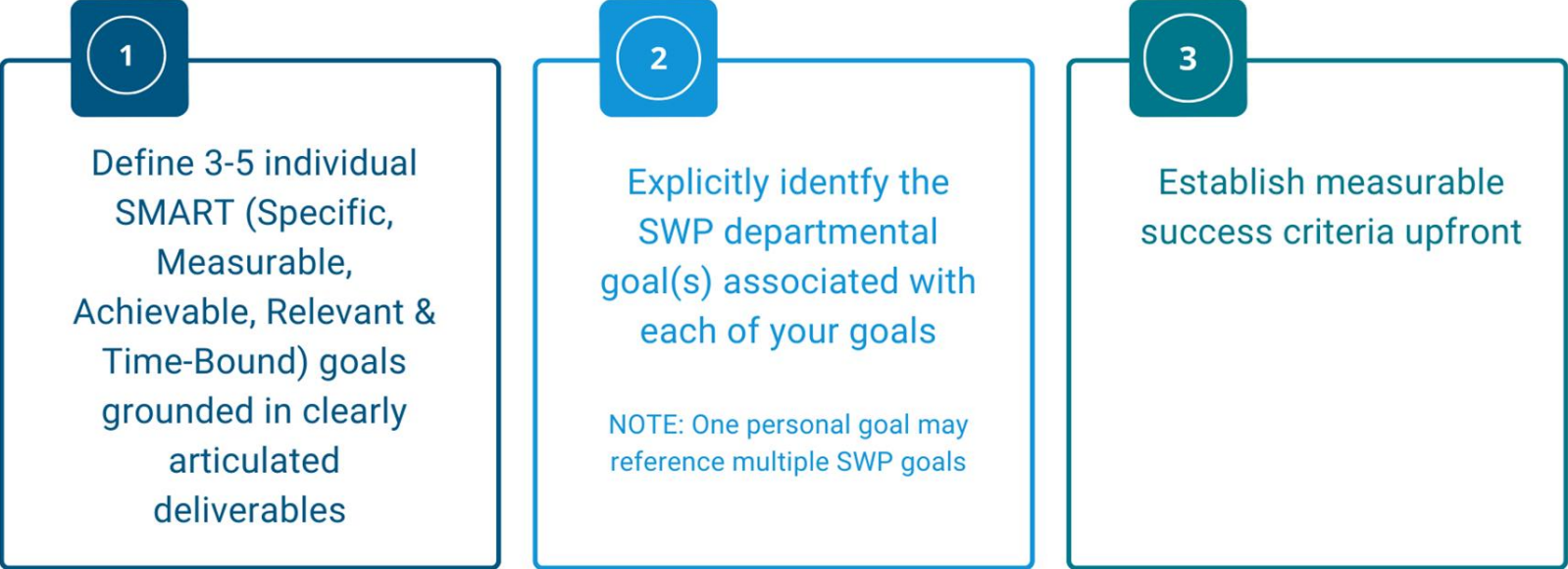
UC Systemwide Procurement Goals - FY 26/27

SWP goals are cascaded from the UC Presidential Priorities, the UC Finance Strategic Plan, SWP Mission & Vision & SWP Vision Journey Map



When you think about goals...

Revised 3-Step Approach to Goal Setting for FY 26/27



- **Goal Title:** Ensure Spend Files are Processed On-Time to Facilitate Target Setting & Benefit Realization – **Foster a culture of Continuous Improvement & Drive 4% Benefit**
- **Goal Title:** Boost Visibility and Cross-Collaboration through Implementation of Standard Project Tracking Tool – **Foster a culture of Continuous Improvement & Drive 4% Benefit**
- **Goal Title:** Implement Efficiencies to Boost Help Desk Turnaround Times and Customer Satisfaction – **Foster a culture of Continuous Improvement**

Examples of Goal Layout

Ongoing Activity	Project-Based	Operational
<p>Goal Title: Drive 4% & Foster CI - Ensure Spend Files are Processed On-Time to Facilitate Target Setting & Benefit Realization</p>	<p>Goal Title: Drive 4% & Foster CI - Boost Visibility and Cross-Collaboration through Implementation of Standard Project Tracking Tool</p>	<p>Goal Title: Foster CI - Implement Efficiencies to Boost Help Desk Turnaround Times and Customer Satisfaction</p>
<p>Goal Description: On a monthly basis, coordinate and complete the data quality review process for campus spend files in partnership with GEP, ensuring all required validations are addressed within established processing timelines to support publication aligned with the Spend Monthly Refresh Calendar. Complete the data quality review on schedule in at least 10 of 12 monthly cycles.</p> <p>Aligns to SWP Departmental Goal(s):</p> <ul style="list-style-type: none"> • Foster a Culture of Continuous Improvement • Drive 4% Benefit 	<p>Goal Description: By July 1, 2027, implement Atlassian JIRA as the standard project tracking tool for all SWP projects, with active projects migrated and dashboard reporting available to leadership.</p> <p>Aligns to SWP Department Goal(s):</p> <ul style="list-style-type: none"> • Foster a Culture of Continuous Improvement • Drive 4% Benefit 	<p>Goal Description: By March 2027, reduce average help desk response time from 2 business days to 1 business day and increase customer satisfaction ratings from 82% to 90%.</p> <p>Aligns to SWP Department Goal(s):</p> <ul style="list-style-type: none"> • Foster a Culture of Continuous Improvement

* Clear deliverables highlighted in RED

Additional STEP Competency Options for FY 26/27

A

Achieving Results

Examples:

- Continuous Improvement
- Continuous Learning
- Problem Solving
- Service Focus

B

Building Relationships

Examples:

- Belonging & Community
- Collaboration
- Communication

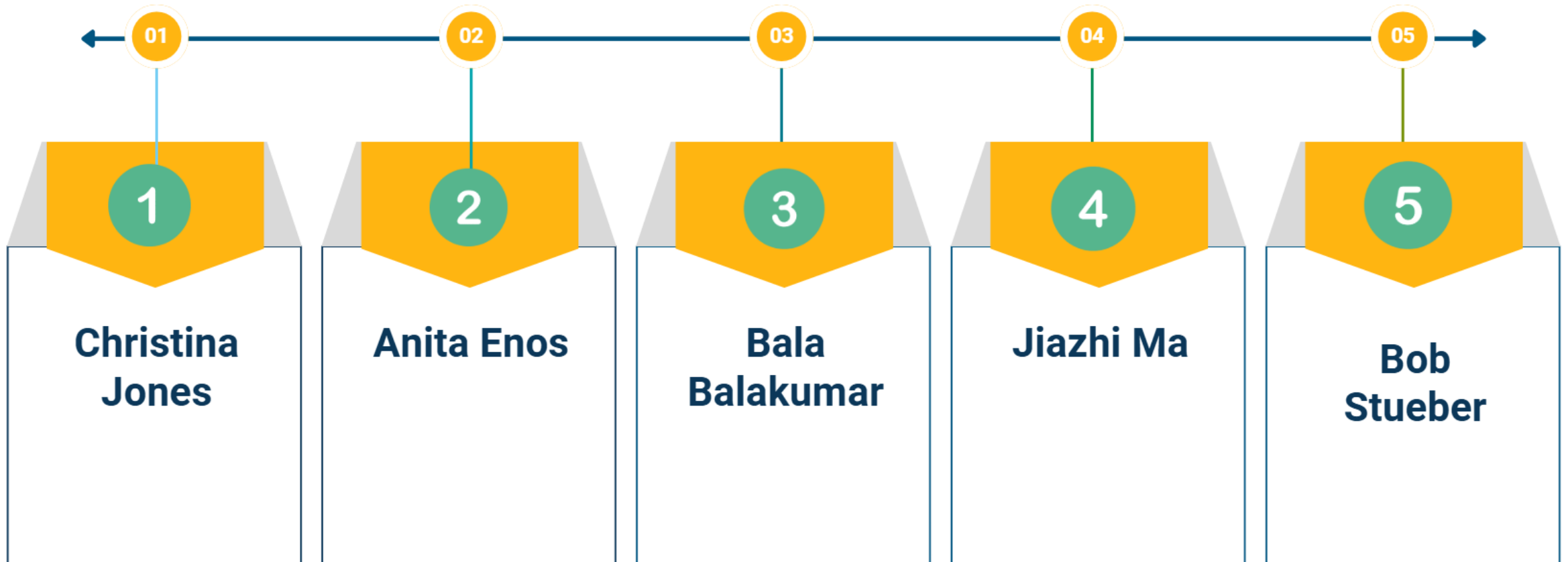
C

Creating the Future


Examples:

- Agility
- Mission & Vision Focus
- Stewardship

SWP ANNIVERSARIES - 10 YEARS




SWP ANNIVERSARIES – 15 & 20 YEARS



1

Giesel Velez


15 years



2

Debra Stevens

15 years



3

Neil Kronenthal

20 years

Incoming and Outgoing SWP Team Members

New to SWP
Navneet Gandhi
Business Systems Analyst
UC Finance Data CoE



New to SWP
Sharanya Sriram
Business Systems Analyst
UC Finance Data CoE



Retiring from SWP
Anita Enos
Category Manager,
Professional Services





US Bank Card Program

Turning payment strategies into
contracted systemwide value

SET Team

What is the average transaction rate for suppliers accepting card payments?

What is the average transaction rate for suppliers accepting card payments?

~2.7%

**What is the total volume moving through
the US Bank program (2025)?**

**What is the total volume moving through
the US Bank program (2025)?**

\$1,633,728,758.26

How many payment products/services exist in the Card Program strategy?

How many payment products/services exist in the Card Program strategy?

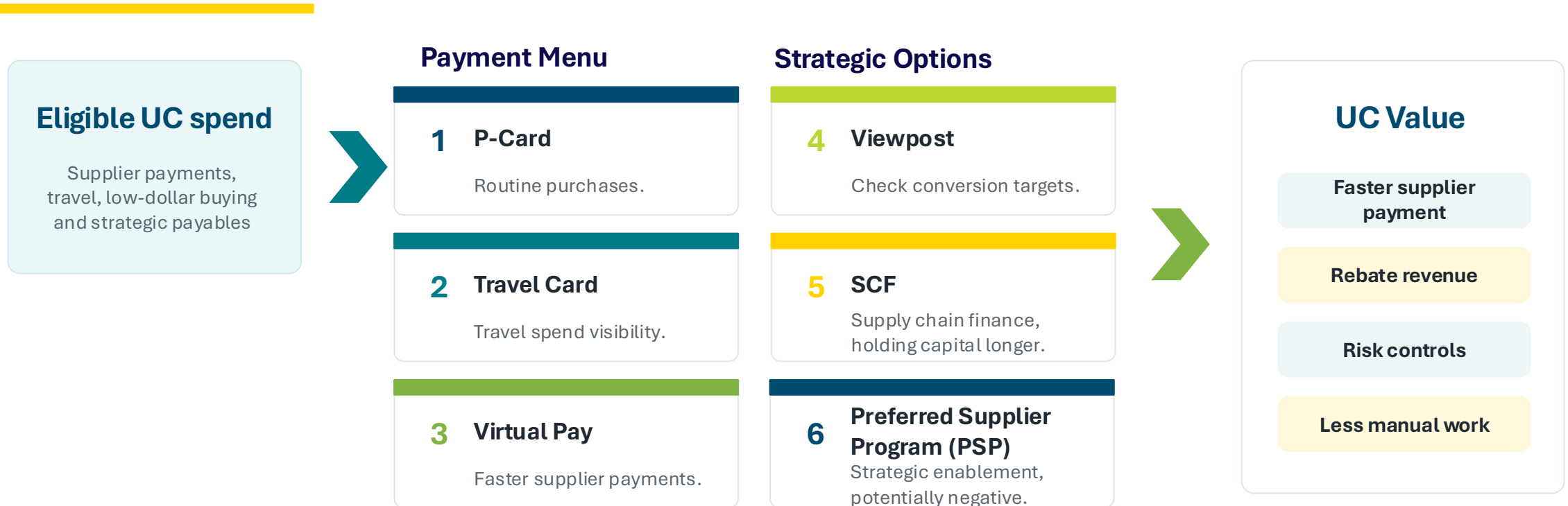
7

P-card
Travel & Entertainment
Virtual/Ghost Card
InstaCard

Viewpoint
Supply Chain Finance
Preferred Supplier Program

Bank Card Purpose

Put each payment where it creates the most value for UC and suppliers.



SWP support: Policy, Contracts, T&Cs, RFPs, Internships & Data

P-Card and Virtual Pay are strongest for routine, episodic and long-tail suppliers; Supply Chain Finance complements card for larger strategic suppliers.

Wins + Learnings (what's working + what we adjusted)

There are proof points; the next phase is systemwide support.

2,601

vendors enrolled through 2024 campaigns

\$139M

new spend opportunity identified

~\$2.5M

added rebate potential

\$275K+

student initiatives and grants

12

US Bank student interns in 2024

What is working

- Campaigns create measurable spend and rebate opportunity.
- Student engagement adds resources and campus momentum.
- Card conference brings intelligence and strategy to the greater UC community.
- RFPs, T&Cs, Business reviews as resources for implementation

What we adjusted

- Supplier opt-outs need active retention programs.
- Inconsistent terms (both payment and T&Cs) weaken the supplier engagement.
- AP data and reporting must become routine infrastructure.
- 2%/10/Net 30 doesn't always work.

Next up

- Standardize preferred payment terms
- Supplier engagement/enablement
- Produce quarterly scorecards and slippage reviews.
- Prioritize getting off checks.
- **MASSIVE RFP**

Scaling is less about new tools — and more about consistent terms, clean data and repeatable campus playbooks.

Significance

The broader team's role is to make payment strategy repeatable (and maybe enforceable).

It's not just a bank card program, it's immediate, realized impacts

2025 Practical impact

\$32.6M in 2025

\$1.7B total volume from Campuses, Health and DOE Labs

\$125 per check

paper checks targeted for elimination

\$249M

working capital opportunity in SCF analysis

Shared KPIs

scorecards, reporting and slippage reviews

What we need from the SWP team

Reinforce preferred payment language.
Escalate supplier and policy blockers early.
Fees are not always the deterrent.

How to use this information

Include payment method in category strategy and execution.
Turn campus wins into shared playbooks (and Benefit Bank!).
Measure adoption quarterly.

Bottom line: the program scales when data, terms, supplier messaging and leadership support move together.



SWP Procurement Academy

Diane Solinger and Nik Goodyear



SWP Procurement Academy

Introduction

Purpose, Team, Program Structure, and Phased Plan

Diane Solinger, Change Management

Nik Goodyear, Program Management

June 5, 2026

SWP Procurement Academy

What it Is and Is Not

IS | A framework

- A learning brand wrapping existing UC content plus targeted new builds
- 9 workstreams across 2 themes: SWP Transformation Enablement (and Beyond) + SWP Essentials
- >70 resources mapped by capability, priority, owner, asset type
- Delivered through the Procurement Portal: Curate, Point, Brand

Co-led by Diane + Nik with 5 named workstream leads. Owners facilitate curate, create, enlist

IS NOT

- A comprehensive L&D program that boils the ocean
- A replacement for HR or L&D function
- A 100% dedicated team or new tool platform
- A prerequisite to the transformation. It enables it.

We curate first.

We build or enlist only when a gap is transformation-critical.

Operating Model: 2 Paths, 9+ Workstreams

SWP Transformation Enablement & Beyond

Capability building to land the transformation and beyond.
Workstreams, led by named owners.

Workstreams (Leads)

Category Management (Matt Hissom)
Sourcing (Open)
Leadership + Culture (Diane + Nik)
Change Management (Diane)

SWP Essentials

Active in Phase 1

- Onboarding (Yasmin)
- Legal & Policy (Bara)
- Data (Vincent C.)
- Systems/Tech (Kevin)

Leads TBD

- Project Management (Open)
- HR Navigation (TBD)

Portal Design and Content Strategy: Renea

Learning Journeys (example): New Hire + Analyst

New Hire | First 90 Days

- Manager 30/60/90 Plan + Buddy System
- SWP Orientation: UCOP, UCF, governance, mission/vision/values
- BUS-43, Sustainability, Legal Compliance
- Tools onboarding: Jira Fundamentals, AI Fluency

Workstreams: Onboarding • Policy • Technology

Analyst | Data-fluent operator

- Jira Fundamentals + AI Fluency
- Insights & Vision (Analytics) webinars
- Reporting & Dashboards 101 (Webinar Wednesdays)
- E&I Data Storytelling Course + CalUsource fluency

Workstreams: Technology • Resource Library • Category Management

Learning Journeys (example): Category Manager + Leader



Category Manager | SaVE Team

- 8 Core Capabilities Framework + CatMan Playbook
- Case Study Workshops + RevGen 101 (refresh)
- Peer Learning Roundtables (weekly, ongoing)
- Embody Our Values series + Leadership Topical Series

Workstreams: Category Management • Leadership + Culture • Change Management



Leader | People Manager / SWPLT

- Leadership Topical Series (Coaching, Influencing, Trust, Psych Safety)
- Embody Our Values - Small Group Discussion Series
- UC Berkeley Manager Cohort (curated systemwide)
- UC Change Essentials + Navigating Transitions

Workstreams: Leadership + Culture • Change Management

It Comes Together In Phases

Foundation → Expansion → Steady State.

Phase 1 — Foundation

April through August 2026

Category Management *Matt*

- Templates & Playbook (Apr 15 anchor)
- Category Strategy Presentation Template
- Case Study Workshops (May)
- RevGen 101 + Peer Roundtables
- Operating Model Document

Leadership + Culture + Change Mgmt *Diane + Nik*

- Values Discussion Series (urgent)
- Leadership Topical Series
- ELT Coaching & Leadership Forums
- UC Change Essentials + Navigating Change
- Change Management Toolkit

Onboarding *Yasmin*

- 30/60/90 + Buddy System
- SWP Orientation + Tools Onboarding
- STEP Process & Goal Setting
- Benefit Bank 101 + LAMP 101

Policy + Systems/Tech *Bara / Kevin*

- BUS-43
- Sustainability + Legal Compliance
- T&Cs Training & Archive
- AI Fluency (urgent) + Jira Fundamentals

Phase 2 — Expansion

September through December 2026

Category Management *Matt*

- QBR Framework + Executive Presentation
- Storytelling Workshop + RevGen Syndication
- PM for CatMan + Influencing / SRM
- E&I Data Storytelling Course

Leadership + Culture + Change Mgmt *Diane + Nik*

- UC Leadership Summit +
- LinkedIn Change Mgmt Certificate

Sourcing + Data + Systems/Tech *Open + Vincent + Kevin*

- CLM Go Live Training (Oct) — GATING
- Data Hub
- KLEW 7-Step Sourcing (resurrect/refresh)
- Strategic Sourcing Essentials and Playbook
- 5 New Systems Training (Phase 2 +)

Legal & Policy + PM *Bara / OPEN**

- Policy Essentials for SaVE
- PM Methodologies & Framework Toolkit

FY27 — Steady State

January 2027 onward

Sourcing & Contract Mgmt *OPEN*

- Sourcing Process Toolkits
- Sourcing Certs (ISM / CPSM / State)
- Full Sourcing & Contract Mgmt Track

Systems/Technology + PM *Kevin+ OPEN*

- Systems Essentials by Role
- PMP / Formal PM Certification

Legal & Policy *Bara*

- Full Policy Track
- Policy Creation & Mgmt for EDP

Leadership + Culture + Change Mgmt *Diane + Nik*

- PROSCI Certification (Change Mgmt)
- E&I EdPro NextGen Leadership Program

Selected anchor items shown by phase per Crosswalk v1.2 Timing column. Will evolve as we evolve.

Portal Wireframe Peek

Renea-led portal build. Main sections plus the existing Content Library.

MAIN PAGE WIREFRAME · PROCUREMENT ACADEMY · CROSSWALK-ALIGNED STRUCTURE

Procurement Academy
Training, tools, templates, leadership development, and transformation resources

Start Here SWP Essentials Category Management Strategic Sourcing Leadership & Culture Change Mgmt Resources

LEARNING PORTAL

Build procurement capability through guided paths and practical resources.

The Procurement Academy organizes SWP learning content by learner need: foundational essentials, category management, strategic sourcing, leadership and culture, change management, and cross-cutting resource collections.

Start with SWP Essentials Browse Learning Paths View Resource Collections

Learning Paths
These are the primary learner-facing topic areas from the crosswalk. Each card should route to a reusable learning path page layout.

- SWP Essentials (37 ASSETS)
- Category Management (16 ASSETS)
- Strategic Sourcing Essentials (8 ASSETS)

LEARNING PATH DETAIL PAGE WIREFRAME · SWP ESSENTIALS · SPREADSHEET CONTENT INJECTED

Procurement Academy
Training, tools, templates, and learning resources

Start Here SWP Essentials Category Management Strategic Sourcing Leadership & Culture Change Mgmt Resources

Procurement Academy / Learning Paths / SWP Essentials

LEARNING PATH

SWP Essentials

Start here for the foundational SWP learning path. This version uses the crosswalk spreadsheet as the source for courses, resource items, statuses, categories, timing, audience, and development action.

Begin Learning Path Filter by Status Download Checklist

On this page
Overview

Topics
There are 6 categories in the SWP Essentials Learning Path.

Activate Windows
Go to Settings to activate Windows.

Theme: SWP Essentials

What's Next

- Category Management Learning Lab June 8th & 9th
- Team & Workstream Leads continue to operationalize and validate content needs with Executive Sponsors and relevant SMEs.

We will be seeking engagement & input!

Workstream	Lead	Example Content
Category Management	Matt	Templates & playbook, case study workshops, peer roundtables, QBR + Exec Pres workshops
Onboarding	Yasmin	30/60/90 plans, buddy system, SWP orientation, Benefit Bank 101, LAMP 101
Legal & Policy	Bara	BUS-43, BAA & GDPR, LOL, Legal Compliance, T&Cs, Best Value
Change Management	Diane	UC Change Essentials, Navigating Change, Change Mgmt Toolkit, LinkedIn cert
Leadership + Culture	<i>Diane + Nik</i>	Values Discussion Series, Topical Series, ELT Coaching Forums, Leadership Summit
Portal & Infrastructure	Renea	Academy portal under SWP brand, content surfacing across all workstreams
Data & Systems/Tech	Vincent + Kevin	AI Fluency, Jira Fundamentals, Tableau, Benefit Bank
Sourcing	OPEN*	KLEW resurrect, Strategic Sourcing Essentials, Sourcing certs, Sourcing Operators Playbook
Project Management	OPEN*	PM Toolkit, LinkedIn PM Cert, PMP
HR Navigation	TBD	UC Pay & Benefits, TBD

UC Procurement Impact



Modernizing & Streamlining Internal Audit

- **Auditboard** agreement (IT category) helps UC take major step to modernize internal audit
- Cloud-based platform supports full audit lifecycle from planning to reporting
- Moves UC away from an aging and fragmented homegrown on-premises system
- Moves UC away from evolving risk and compliance demands
- Shared, cloud-based system boosts efficiency, consistency, and collaboration systemwide.
- IT Category Manager: Bala Balakumar



UC Systemwide Procurement Mission and Vision



SWP Mission Statement

Defines why we exist, what we do, and who / what / why we serve...

We partner with our UC community to optimize supply chain strategies and processes to innovate, enhance value, reduce risk, and improve efficiencies to support UC's mission of teaching, research, and public service.



SWP Vision Statement

Frames where we want to be in the foreseeable future...

We are a team of leaders who inspire exceptional performance in our people, processes, and technology to deliver world-class, self-funded supply chain solutions with economically and socially responsible sourcing.