



# Impact Spending – Operational Update

Regent Finance  
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# Overview Slide

- Purpose of presentation
  - Provide a progress update on Impact Spending
    - Revenue Contracting Policy
    - Pilot: Customer Choice spending
    - Pilot: Tier 2 opportunities
    - Pilot: Construction sourcing
    - Mentor/Protégé program

# Revenue Contracting Policy

- Purpose
  - Close an infrastructure gap by establishing contracting policy governing revenue contracts
  - Adopt public procurement principles for revenue contracting
- Progress
  - Wrote 1<sup>st</sup>- Administrative Policy Statement (APS)
  - Campuses have reviewed and provided comment
- Next Steps
  - APS moving through the release process
    - Initial release 2025

# Pilot: Customer Choice spending

- Purpose
  - Understand buying behavior of campus customers when making purchases below our bid threshold of \$150,000
  - Look for trends or indicators that reveal how customers choose suppliers
- Progress
  - Conducted deep dive analytics on spend history
  - Performed initial analysis
  - Found several leading indicators for follow up with campuses
- Next Steps
  - Survey/interview campus departments

# Pilot: Tier 2 Opportunities

- Purpose
  - Identify opportunities for small, local suppliers to support CU as a Tier 2 supplier below our large national suppliers
- Progress
  - Released 2 surveys:
    - Tier 1 suppliers to assess their current Tier 2 sourcing practices
    - Existing and potential Tier 2 suppliers to assess their interest and experience as a Tier 2 supplier
- Next Steps
  - Analyze the survey responses

# Pilot: Construction Sourcing

- Purpose
  - Conduct intentional outreach as CU establishes a “Standard Order Contracting” program
  - Evaluate the effort and benefits of adding outreach ahead of sourcing event
- Progress
  - Created sourcing timeline
  - Engaged with system and campus facility’s teams
  - Created outline of outreach campaign
- Next Steps
  - Finalize timeline with the facility’s teams
  - Commence outreach efforts

# Mentor/Protégé Program

- Purpose
  - Create a program where CU serves as a mentor to small, local suppliers
  - Provide acute engagement and assistance to aspiring local suppliers
- Progress
  - Conducting a proof-of-concept mentor/protégé with local firm in Colorado Springs
  - Establishing a mentor/protégé playbook
- Next Steps
  - Continue mentor/protégé engagement while finalizing the playbook
  - Look to rollout a formal program