

# REGISTER FOR THE PREMIER PUBLIC SECTOR EVENT



October 9-12, 2016  
Antlers Hotel  
Colorado Springs, CO



## *Achieving Procurement Excellence in 2016 A Golden Opportunity for Success*

48<sup>th</sup> Annual Conference & Products Exposition  
and the 21<sup>st</sup> Annual Achievement of Excellence in Procurement Awards Presentations



18 CEH's  
Available

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**AEP**  
Award Criteria  
classes now  
available!

## **PRESIDENT'S INVITATION 2016**

*On behalf of the National Procurement Institute, I would like to personally invite you to attend the National Procurement Institute's 48<sup>th</sup> Annual Conference and Products Exposition and the 21<sup>st</sup> Annual Achievement of Excellence in Procurement Awards Presentation. Please consider joining us for this once a year opportunity to network with public procurement officials from a variety of public organizations from all over the nation, and with current and potential suppliers.*

*The venue for the Conference and Products Exposition is the Antlers Hotel in the heart of beautiful downtown Colorado Springs, Colorado, October 9-12, 2016. The venue is approximately 25 minutes from Colorado Springs Municipal Airport.*

*The conference theme is, "Achieving Procurement Excellence in 2016 ~ a Golden Opportunity for Success" and our educational program is being coordinated by Christina Pryor, CPPB, of the City of Chandler, Arizona. This year's program will offer a variety of great general sessions and workshops that are relevant to the professional development of our delegates, focusing on AEP criteria and management/leadership skills.*

*The Exhibits and Sponsorship Co-Chairs, Gilbert Garza, CPSM from San Jacinto River Authority and Jay Yoho from Ohio Public Employees Retirement System have assembled an excellent Products Exposition that will showcase the latest products, technology, and services. Our suppliers are anxious to show you what's new and improved, and how their products and services can benefit your organizations.*

*In addition to the conference and planned events, the Antlers Hotel Colorado Springs is located in the heart of downtown with spectacular views of Pikes Peak and the Rocky Mountains. The hotel is within walking distance to numerous restaurants, shops, museums and downtown nightlife.*

*I look forward to welcoming you to the NPI Conference, celebrating the 21<sup>st</sup> anniversary of the Achievement of Excellence in Procurement Awards Program, and sharing this momentous occasion with all of you!*

*Please remember to take advantage of the reduced conference registration fee and register by the 'Early Bird' deadline!*

Dawn Berry, CPPB  
2015-2016 NPI President

## **NPI's 48<sup>TH</sup> ANNUAL NATIONAL CONFERENCE & PRODUCTS EXPOSITION**

**When?** October 9-12, 2016

**Where?** Antlers Hotel, Colorado Springs, Colorado

These days, you have lots of choices among conferences aimed at purchasing professionals. That's why NPI is committed to delivering a truly singular conference experience for those, like you, who are at the top of their game and want to exchange ideas with the best minds in the business without breaking the bank.

### ***The Speakers***

Visionaries. Pioneers. Mavericks. Practitioners with plenty of straight talk about success and failure.

### ***The Program***

Looking for fresh topics and approaches that work in today's economy? Our interactive sessions and workshops deliver by focusing on the fluid organizational context that purchasing professionals navigate every day. Your personal experiences and challenges drive the dialogue.

### ***The Networking***

NPI's three and a half day format means more time to network. And we make it easy to find the fun with specially arranged activities and hospitality events.

- Welcome Reception
- 21<sup>st</sup> Annual AEP Awards Dinner
- Presidential Awards Luncheon
- Buyer/Supplier Networking Event

### ***The Products Exposition***

This is your opportunity to meet one-on-one with current suppliers and identify potential suppliers that are focused on meeting your agency's needs. Meet top-notch suppliers and experts in one location, a rare opportunity to find out more about new and practical solutions to your challenges! Find out more about state-of-the-art products and services!

### ***The Value***

NPI members get top-tier programming, including workshops, for \$650 (early bird registrants). That's maximum bang for your buck.

### ***About NPI***

The National Procurement Institute (NPI), founded in 1968, is geared towards establishing cooperative relationships among our members for the development of efficient purchasing methods and practices in the areas of governmental, educational, airport, and institutional procurement. Our members are directly engaged in the purchasing and supply management activities of their entities in the positions of procurement managers, supplies management, purchasing agents, and buyers.

## SCHEDULE AT A GLANCE

Sunday, October 9		11:00 AM - 2:00 PM	
6:30 - 7:00 PM	First Timers' Welcome Reception	48th Annual Products Exposition and Buffet Lunch	
7:00 - 9:00 PM	Welcome Reception	2:00 - 3:30 PM	How to Set Goals and Actually Achieve Them
Monday, October 10			The Professional Purchaser: What You Bring to the Table
8:00 - 10:00 AM	Opening Ceremony and Breakfast: "Filling the Glass: Real World Tactics and Motivation for Increasing Productivity and Job Satisfaction"	3:45 - 5:15 PM	Reinventing Procurement - The City of Tucson's Procurement 2.0 Project
10:15 - 11:15 AM	General Session: What "Procure" Meant, Means and May Become		Critical Conversations: Delivering Messages People Don't Want to Hear
11:30 AM - 12:30 PM	Presidential Awards Lunch	6:00 - 9:00 PM	21 <sup>st</sup> AEP Awards Gala and Carlton N. Parker Award Presentation
12:30 - 2:00 PM	The Secret of Making Really Good Decisions	Wednesday, October 12	
	Effective Statements of Work	8:00 - 9:30 AM	Policy and Procedure: Is it Working for You?
2:15 - 3:15 PM	Change Management		Using Social Media as the Edge in the War for Talent
	Business Ethics	9:45 - 11:15 AM	Contract Administration: Procurement's Achilles Heel
3:30 - 5:00 PM	The FTA Super Circular		LEAN Basics Part 1
	5 Keys to Negotiating Strong Energy Supply Contracts	11:30 AM - 1:00 PM	Annual Business Meeting and Installation of Officers Lunch
6:00 - 9:00 PM	Buyer/Supplier Networking Event	1:30 - 2:30 PM	LEAN Basics Part 2
Tuesday, October 11			Technical Writing Skill Building
8:00 - 9:30 AM	General Session: METOO: The Disruptive Forces Keeping CPOs Awake at Night	2:45 - 3:45 PM	AEP Best Practices
9:45 - 10:45 AM	The Texas Two-Step: Lead the Dance Toward an Effective Procurement Strategy		Case Studies in Procurement: Roundtable Discussion
	You be the Judge! Procurement Case Law	4:00 - 5:00 PM	Closing General Session: Jeopardy

### Monday, October 10, 2016 8:00 am - 10:00 am

#### Opening Ceremony and Breakfast

#### Filling the Glass: Real World Tactics and Motivation for Increasing Productivity and Job Satisfaction

Keynote Speaker Barry Maher

In this high-energy, humor-rich presentation, Barry Maher offers the antidote to presentations that are simply "let's all think happy thoughts and everything will be wonderful" fluff. It's chock full of nuts and bolts content and straight-talk tactics, all of which procurement officials will be able to apply immediately. Yet it's real-world motivational, even inspirational. Perfect for the most cynical veteran AND the most starry-eyed (or the most discouraged) novice.

Procurement officials will learn:

Powerful, often neglected strategies for motivating your people and your internal clientele;

The single most powerful leadership strategy

How to create instant rapport with people of all types;

How to easily turn negatives into positives;

And much, much more.

### Monday, October 10, 2016 10:15 am - 11:15 am

#### General Session: What "Procure" Meant, Means and May Become

#### AEP AWARD CRITERIA 3

Duff Erholtz and Tammy Rimes

Join us as we explore the roots of public procurement, it's evolution to the present, and a glimpse into the crystal ball of what it may look like in the future. With everything involved in the procurement process changing – procurement trends, technology, workforce, and the political scene – what will remain the same? Discover how future changes may affect you, and how to successfully adapt and succeed!

### Monday, October 10, 2016 11:30 am - 12:30 pm

#### Presidential Awards Lunch



**Monday, October 10, 2016 12:30 pm - 2:00 pm**

## The Secret of Making Really Good Decisions

**AEP AWARD CRITERIA 1**

*Alan Ovson*

Decisions, decisions, decisions – we have to make them all of the time. Sometimes we don't even get a chance to mull them over for a few seconds, sometimes we mull them over too much, and sometimes we make the wrong decisions no matter what.

This session presents recent findings on how the brain works in the decision making process and presents some easy to learn strategies that will help participants define priorities, recognize consequences, and understand how thinking plus intuition plus emotions will help straighten the decision making process while helping reduce procrastination. We live by the decisions we make! This session lays out the foundation to help make our decisions the best they can be.

## Effective Statements of Work

**AEP AWARD CRITERIA 9, 14**

*Janet Hasty, CPPO, CTPM*

The Statement of Work can make or break procurement. Having a well written SOW is essential to managing a sound contract and mitigating contract risks. Conversely, a poorly written SOW can cause all types of frustration and disputes. Participants will learn how to gather information and categorize the various components of an SOW. Participants will leave well equipped to write a SOW that reflects actual requirements, produces competitive proposals, and guides contractor performance.

**Monday, October 10, 2016 2:15 pm - 3:15 pm**

## Change Management

**AEP AWARD CRITERIA 18**

*Christine Weber, C.P.M., CPPB*

Procurement teams are constantly challenged to meet customer needs within limited budgets while maintaining fair and open competition.

Given such competing priorities, this session sets up a safe learning environment for a frank best practices discussion of how to survive and thrive.

## Business Ethics

**AEP AWARD CRITERIA 1**

*Phillip Ellison, MBA, CPSM, C.P.M., RTSBA*

Procurement Officials will learn the sources of ethical values, how they differ from the law, and the different types of ethical values. They will also learn some guidelines for ethical decision making and how to cope with unethical situations. An ethics self-evaluation will be given as well as discussion of ethical dilemmas in the public sector.

**Monday, October 10, 2016 3:30 pm - 5:00 pm**

## The FTA Super Circular

**AEP AWARD CRITERIA 1, 3**

*Cecilia Comito, Assistant Chief Counsel, Federal Transit Authority*

How will the FTA Super Circular affect procurement? The Federal Transit Authority's Assistant Chief Counsel from the Denver, CO office will tell you in this session.

## 5 Keys to Negotiating Strong Energy Supply Contracts

**AEP AWARD CRITERIA 18**

*Bob Wooten, Tradition Energy*

Everything seems to come down to price. As a buyer of energy, however, you need to realize that the "price you want" is not necessarily "the price stated on the agreement" because the total price you pay once the bill arrives might be impacted by your agreement terms. Join us as we discuss one of the most critical aspects of energy procurement and how to ensure energy contracting success.

**Monday, October 10, 2016 6:00 pm - 9:00 pm**

## Buyer/Supplier Networking Event

**Tuesday, October 11, 2016 8:00 am - 9:30 am**

## General Session: METOO: The Disruptive Forces Keeping CPOs Awake at Night

**AEP AWARD CRITERIA 3**

*Tania Seary*

This topic is for procurement leaders around the world who may be dealing with some sleepless nights as they defend themselves and their agencies against powerful disruptive forces: Markets, Ethics, Transparency, Optionality and Organizational Alignment. These are the current issues procurement professionals are faced with.

These forces are set against a backdrop of procurement's goal to create a cost conscious culture, teams having to work harder than ever to make sure everyone is "on the bus", utilizing negotiated contracts and treating every dollar as it were their own.

Knowing how to balance the forces will let procurement professionals sleep soundly at night.

**Tuesday, October 11, 2016 9:45 am - 10:45 am**

## The Texas Two-Step: Lead the Dance Toward an Effective Procurement Strategy

**AEP AWARD CRITERIA 18**

*Tammy Rimes*

Most of the time, purchasing teams are in reactive mode. Emergencies, customer requests, and the latest news stories all cause us to jump. Learn to create a plan, just like private business, uncover ways to have automation free you from tedious tasks, build a cooperative strategy that is consistent, and create a world class operation that could win any dance contest!

## You be the Judge! Procurement Case Law

**AEP AWARD CRITERIA 1, 3**

*Beth Fleming, CPPO, CPSM, C.P.M.*

Litigation is an ugly word in public procurement. None of us want to be so exposed to the public and courts' scrutiny that every process and statement are analyzed for fairness and accuracy. However, it does happen and understanding recent court cases, the arguments presented, and the outcomes assist public procurement officials in establishing policies and procedures to better protect their agency and to establish fair and transparent access for suppliers. This is an interactive session where participants will review relevant case law

on several procurement cases, consider the arguments, and discuss the possible outcomes. The instructor will then reveal the final case decisions and discussion will follow. Cases will be relevant and include topics such as RFP protests, contract compliance, non-compliant bids, mandatory requirements and specification conflicts.

**Tuesday, October 11, 2016 11:00 am – 2:00 pm**

## 48th Annual Products Exposition and Buffet Lunch

**Tuesday, October 11, 2016 2:00 pm – 3:30 pm**

### How to Set Goals and Actually Achieve Them

**AEP AWARD CRITERIA 3**

*Alan Ovson*

Want to be a high performance person able to achieve your dreams and aspirations? High performance people, just like high performance organizations, have key factors in common. They develop clear pictures of what they want, can see themselves actually doing what they want to do, are clear and excited about their basic purpose, and they clearly understand what they value. These vision elements are the motivators that help people set realistic goals, move forward responding creatively to change, push past both self-imposed and other barriers. Once a person has a clear vision, they can easily create the goals that will get them more. This session will help them do it.

### The Professional Purchaser: What You Bring to the Table

**AEP AWARD CRITERIA 3**

*Carol Cooper, C.P.M., CPSM, CPPO*

This session discusses the value procurement professionals add for their entity, customers, vendors, and communities. We often think what we do every day is just part of the job. Well, it is. But how you do that job makes all the difference in the value you and your department adds. Let's step it up.

**Tuesday, October 11, 2016 3:45 pm – 5:15 pm**

### Reinventing Procurement - The City of Tucson's Procurement 2.0 Project

**AEP AWARD CRITERIA 18**

*Marcheta Gillespie, CPPO, C.P.M., CPPB, CPM*

Many of our organizations have been "challenged to change" at some point in the past. But, did we really change? Or did we make safe *adjustments* to our policies, programs or procedures? Work a little faster, enhance a website, increase a purchase threshold? While each of these are certainly worthwhile improvements for any organization, are they truly the types of change that our agency, our community or our profession needs? And who is it that determined which change should occur? Us? The truth is change....real change.....is hard. It takes a tremendous amount of effort, energy, support and it can be a little scary. And let's be honest, as a profession, procurement isn't known for BIG change. We aren't generally viewed as a dynamic function adapting quickly to meet demand and the changes around us. So, when Tucson was faced with some serious economic, organizational and political changes, we had a serious challenge.....and we turned it into an opportunity. This session will share our journey, our lessons learned and our future direction as we reinvent Procurement.....Procurement 2.0.

### Critical Conversations: Delivering Messages People Don't Want to Hear

**AEP AWARD CRITERIA 3**

*Diane Palmer-Boeck CPPO, CPPB, Director of Procurement and Project Management*

As leaders, we are tasked with delivering messages people may not want to hear. Do you have the skills you need to hold critical conversations? This session will equip you to conduct difficult or critical conversations. The tools you'll leave this session with include:

- Developing communication processes for handling difficult and critical conversations
- Understanding communication styles and structuring conversations for clear, successful exchanges
- Delivering difficult and critical information successfully to attain desired results

**Tuesday, October 11, 2016 6:00 pm – 9:00 pm**

### 21st AEP Awards Gala and Carlton N. Parker Award Presentation

**Wednesday, October 12, 2016 8:00 am - 9:30 am**

### Policy and Procedure: Is it Working for You?

**AEP AWARD CRITERIA 3, 4, 18**

*Carol Cooper, C.P.M., CPSM, CPPO*

The class explains the difference between policy and procedure, lists "must have" procedures, and gives examples of procedures both good and bad. But just having a manual is not enough. Procurement customers have to read it and comply. How do you get buy-in and actual use from the other departments in your entity? Seasoned procurement professionals will enjoy some tips on how to use the manual as a customer service tool.

### Using Social Media as the Edge in the War for Talent

**AEP AWARD CRITERIA 3, 18**

*Tania Seary*

It's not rocket science that in order to relate to and recruit the best talent, you need to have a strong presence in those places where your talent is talking...and there is no doubt that the next wave of talent is online. But how are you using the power of social media to give you an edge in attracting the best and brightest commercial talent? Tania will share how you can use social media to:

- Position yourself as a 'Great Procurement Boss': How are you using social media to position yourself as a thought-leader – someone who is progressive and has much to offer employees in the way of learning and experience? What are the topics that only you can talk about online?
- Improve your reputation as an Employer of Choice: How are you using social media to meaningfully demonstrate progressive brand values of innovation, collaboration and global opportunities?
- Identify and reach hidden talent: Who are the rising stars in the profession? Where can you find and engage them online – before they start looking at your competitors' as future employers?
- Vet prospective employees: Tips for using social media to validate potential employees' experience, cultural values and confirm their ability to leverage online channels to access intelligence and work effectively alongside stakeholders, customers and suppliers.
- Turning employees into brand advocates: What are your employees

and suppliers saying about you online? Strategies for engaging your employees on social media to boost your employee value proposition.

it is important to know what is acceptable and professional in the world of electronic communication.

**Wednesday, October 12, 2016 9:45 am – 11:15 am**

## Contract Administration: Procurement's Achilles Heel

**AEP AWARD CRITERIA 9, 14, 18**

*Marcheta Gillespie, CPPO, C.P.M., CPPB, CPM*

Many Procurement organizations excel at sourcing and contracting. However, few have developed and implemented value-added contract administration programs. If you have created a great solicitation that leads to a great contract, but you fail organizationally to properly execute that contract, you have wasted your time and money! This session will focus on defining the purpose and value of Contract Administration, and will discuss the tools and approaches to helping you ensure you are reducing your agency's legal and financial risk, lost revenue and process efficiencies.

## LEAN Basics Part 1

**AEP AWARD CRITERIA 4E**

*Lorrie Ray, MESG*

Whether you are just thinking about a LEAN implementation or you've been running LEAN for years, this course is designed to build or rebuild the foundational knowledge your people need to meet the challenges of a LEAN work environment. Participants will learn the basics of LEAN management, including the definition of LEAN, principles of innovation, and steps to take to eliminate wasteful activities from work processes. Let them learn to do more than work LEAN. Help them learn to think LEAN.

**Wednesday, October 12, 2016 11:30 am - 1:00 pm**

## Annual Business Meeting and Installation of Officers Lunch

**Wednesday, October 12, 2016 1:30 pm - 2:30 pm**

## LEAN Basics Part 2

**AEP AWARD CRITERIA 4E**

*Lorrie Ray, MESG*

Continued: Whether you are just thinking about a LEAN implementation or you've been running LEAN for years, this course is designed to build or rebuild the foundational knowledge your people need to meet the challenges of a LEAN work environment. Participants will learn the basics of LEAN management, including the definition of LEAN, principles of innovation, and steps to take to eliminate wasteful activities from work processes. Let them learn to do more than work LEAN. Help them learn to think LEAN.

## Technical Writing Skill Building

**AEP AWARD CRITERIA 9, 14**

*Janet Hasty, CPPO, CTPM*

Do you consider yourself a technical writer? No? If you review or write specifications, you are a technical writer. This session will provide you with tips on how to write clear specifications so that your solicitation documents reflect favorably on both you and your entity. The session also includes a discussion of Netiquette – the proper use of business email. As email has almost replaced the paper form of communication,

**Wednesday, October 12, 2016 2:45 pm - 3:45 pm**

## AEP Best Practices

**AEP AWARD CRITERIA 18**

*Brian Garrity, C.P.M., CPPB, AEP Committee*

This session will highlight some of the AEP best practices achieved by your public procurement peers. Delegates are invited to participate in the discussion about the evaluation criterion presented during this session, and will hear from those who have successfully implemented the procurement practices in their organizations.

## Case Studies in Procurement: Roundtable Discussion

**AEP AWARD CRITERIA 3, 14**

*Christine Grommons, CPPB*

This session is an interactive small group case study presentation discussing the use of the Request for Proposal process as the method of solicitation for professional and specialized services when more than just cost is a key factor in determining the award and the unique challenges it presents.

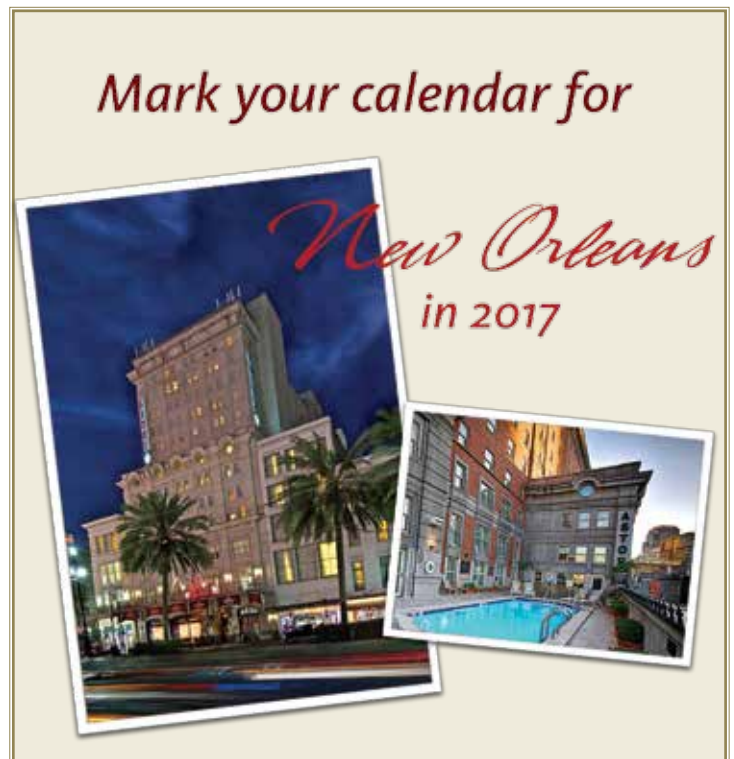
Attendees are encouraged to bring a case study of their own to discuss and participate in open discussion regarding their experiences and others'.

**Wednesday, October 12, 2016 4:00 pm - 5:00 pm**

## Closing General Session

### Jeopardy

*Dawn Berry*



## DELEGATE REGISTRATION FORM

48<sup>TH</sup> ANNUAL CONFERENCE AND PRODUCTS EXPOSITION  
 ANTLERS HILTON, COLORADO SPRINGS, CO • October 9-12, 2016

Name (last, first) \_\_\_\_\_ Certification(s) \_\_\_\_\_

Name to be printed on badge \_\_\_\_\_

Title \_\_\_\_\_ Agency/Organization \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone ( \_\_\_\_\_ ) \_\_\_\_\_ E-mail Address \_\_\_\_\_

Any special dietary needs or special accommodations you may require? \_\_\_\_\_

Is this your first NPI Conference?  Yes  No

**CONFERENCE FEES:** These fees cover all scheduled sessions and events, per person. The non-NPI member full conference fee includes membership benefits in NPI (if eligible) from time of registration through January 15, 2016.

	Early Registration Fee until July 8th	Fee if Received July 9 - Sept 16th	Registration after Sept 16th	
<input type="checkbox"/> NPI member conference fee*	\$650.00	\$700.00	\$750.00	\$ _____
<input type="checkbox"/> Non-member fee	\$900.00	\$950.00	\$1000.00	\$ _____

\*This rate also applies to non-NPI members who are members of an NPI chapter, ISM affiliate, or Recipient of Achievement of Excellence in Procurement.

### SINGLE DAY CONFERENCE REGISTRATIONS

NPI Members Check Conference Day(s):  Monday  Tuesday  Wednesday \$250/Day \$ \_\_\_\_\_

Non-Members Check Conference Day(s):  Monday  Tuesday  Wednesday \$350/Day \$ \_\_\_\_\_

\*The daily rate includes all activities and meals scheduled for that day.

### RETIRED NPI MEMBER FEES:

Retired members of NPI and delegates' spouse may attend the conference and products exposition at no charge, but must purchase tickets for the following functions.

	Number of guests	
Welcome Reception ..... Oct. 9, 2016	..... \$50/person	Qty: _____ \$ _____
Opening Ceremony and Breakfast ..... Oct. 10, 2016	..... \$35/person	Qty: _____ \$ _____
Presidential Lunch ..... Oct. 10, 2016	..... \$55/person	Qty: _____ \$ _____
Buyer/Supplier Networking Event ..... Oct. 10, 2016	..... \$50/person	Qty: _____ \$ _____
Buyer Supplier Lunch ..... Oct. 11, 2016	..... \$50/person	Qty: _____ \$ _____
AEP Awards Banquet ..... Oct. 11, 2016	..... \$75/person	Qty: _____ \$ _____
Installation Luncheon ..... Oct. 12, 2016	..... \$50/person	Qty: _____ \$ _____
Full Meal Package ..... \$365/person	.....	Qty: _____ \$ _____

**TOTAL:** ..... \$ \_\_\_\_\_

### PAYMENT METHOD:

Enclosed is my check or money order, payable to NPI in the amount of \$ \_\_\_\_\_

Charge my  VISA  MASTERCARD  AMERICAN EXPRESS

Amount Authorized: \_\_\_\_\_ Card Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Name on Card: \_\_\_\_\_ Signature: \_\_\_\_\_

**\*\*WE MOVED! PLEASE BE SURE TO UPDATE YOUR ACCOUNTS PAYABLE RECORDS\*\***

PLEASE FORWARD APPLICATION AND PAYMENT TO:

MAIL: National Procurement Institute • Delegate Registration • PO Box 2774 • Rockport, TX 78381

Phone: 866-877-7641 • Email: [executivedirector@npiconnection.org](mailto:executivedirector@npiconnection.org)

Cancellation notice must be received in writing or via email to [executivedirector@npiconnection.org](mailto:executivedirector@npiconnection.org). Cancellations received more than 21 days prior to the Conference will receive a full refund, less a \$100 administrative fee. Cancellations received less than 21 days prior to the Conference will receive a 50% refund, less a \$100 administrative fee. Attendee substitutions within the same agency may be done at any time with written or email notification to NPI. No refunds are given for no-shows.





National Procurement Institute, Inc.  
PO Box 2774  
Rockport, TX 78381



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