NPI is now the National Procurement Institute

The results of the vote have been tabulated and over 97% of the voting membership endorsed the name change to National Procurement Institute, Inc.

You will see our new name on our website and printed material in the future. NPI’s Board of Directors approved several initiatives from the strategic planning effort started last year with the objective of ensuring that NPI members realize significant value from their participation in the association and that we are strategically positioned to compete in the modern marketplace.

One of the key components of the strategic plan is to focus on brand modernization. In addition to the name change, the Board has adopted a new logo.

Our members are our most important asset - we hope that our work on the Strategic Plan will serve you!

2011 Conference and Products Exposition

The board of director’s for the National Procurement Institute, Inc. (NPI) invites you to attend the 43rd Annual Conference and Exposition. It will be held October 30 through November 2, 2011, at the Omni Interlocken Hotel in Broomfield, Colorado. Please join us to participate in current professional development activities, listen to knowledgeable and informative speakers and to visit the exhibitors at the Product Expo.

This year’s conference will offer sessions focused on leadership topics, AEP related topics and other professional development courses geared to help you achieve procurement excellence. NPI is also proud to have four former NPI Presidents presenting sessions.

The conference program is also designed to facilitate numerous networking opportunities such as a

Continued on page 2...
Welcome Reception, Opening Ceremony, Presidential Gala Dinner and the Buyer/Supplier Roundtable Luncheon.

The conference is an excellent opportunity to obtain continuing education hours as well as make learning fun and exciting.

I encourage you to participate and take advantage of this professional growth opportunity. If you have questions or need assistance with conference registration, please contact Craig Rowley, NPI Executive Director, telephone 702-989-8095, or email executivedirector@npiconnection.org. You may contact me by telephone at 972-216-6394 or email mbrand@cityofmesquite.com.

I look forward to meeting each of you in Broomfield!

Michele Brand

“Leadership in Action”...What’s In Store for NPI’s 43rd Annual Conference
By January Cook, Program Chair

This year’s educational program will prove to be a great investment of your training dollars! From sessions that will promote and enhance leadership skills, to sessions specific to AEP award criteria, this year’s program will provide a lot of bang for your buck! Earn 14.25 continuing education hours, network with other procurement professionals from across the nation, and reap the benefits of attending this year’s conference!

Speaker Highlights for the General Sessions:

On Monday morning, following the opening ceremonies, professional speaker and magician Keir Mathur will present the first educational session of the conference, “The Magic Solution”. Keir will share with us his insight into how to look in unique directions to find solutions to everyday problems. Combining humor with magic, Keir will deliver thought provoking messages that allow delegates to see a way to do more with less, while keeping the delegates engaged and entertained. Keir travels the country performing both as a magician and speaker/humorist on topics ranging from how to improve your memory to conflict resolution and much more. He is the author of Coffee Cups, Pens and other things I’ve picked up along the way, and resides in Denver, CO.

Also on Monday, author Barry Maher will present “Slicing through the Noise: Powerful Communication for Leadership and Professional Success”. In this session, Barry will show delegates how to communicate with people of all types: to diplomatically, tactfully get what you want and get people to look forward to whatever trip you’d like them to take. Barry is the author of Filling the Glass which has been honored as “[One of] The Seven Essential Popular Business Books.” You may have seen Barry on the Today Show, NBC Nightly News or CNBC, and he’s frequently featured in publications like USA Today, the Wall Street Journal, the New York Times, the London Times and—what he insists is his personal favorite—Funeral Service Insider.

On Tuesday morning, Leslie Vallie, CPPO, CEO of PPG Consulting Service, LLC will present “Change Management in Changing Times”. The Change Management overview is designed to assist delegates to gain an understating of the process of change, how it effects the procurement organization, as well as to learn the key elements of a successful transition. Delegates will be introduced to the psychology of change and methods to implement change in organization environments. Leslie worked for many...
years for the federal government holding numerous positions as Contracting Officer, Policy/Claims Advisor, Construction, Service and A/E Contracting Chief, and Executive Director of Procurement & Contracts.

On Wednesday morning, Richard Pennington, CPPO, C.P.M., J.D., Managing Member of SCOPEVision© LLC in Denver will present “Lateral Leadership: Your Contribution to the Success of Teams”. This presentation will explore the special role of leadership in teams and identify the essential elements of team discipline. Join us in this session to identify constructive team leadership skills, and learn some surprising and fun visual metaphors to remember the elements and behaviors that are essential to team success. Richard first learned about teams professionally while flying B-52s in the Air Force. Richard retired from the practice of public procurement law last year. Richard is a former director of the Colorado Division of Finance and Procurement and State Purchasing Director. He is a distinguished graduate of the United States Air Force Academy and graduated with honors from the University Of Denver College Of Law.

These are just a few of the sessions scheduled for this conference! Please visit NPI’s website https://www.npiconnection.org/events/conference.asp to view the complete conference program. You can’t afford to miss this great educational opportunity! Register now!

Premier Sponsor of the NPI 43rd Annual Conference & Products Exposition

NPI is pleased to announce that the National Joint Powers Alliance (NJPA) is this year’s Premier Conference Sponsor. NJPA is a member-driven service cooperative with a membership exceeding 30,000. NJPA offers a multitude of products, equipment and service opportunities to education, government and other non-profit entities. To learn more about NJPA, visit their website at www.njpacoop.org.

Duff Erholtz, manager of Membership services for NJPA, will be presenting the session “LEVERAGING CHOICE IN PROCUREMENT: When are Cooperative Agreements right for my organization?” on the opening day of the conference. NJPA will also be participating in the Products Exposition, so please attend the session, and/or visit their booth at the Products Exposition and thank NJPA for their sponsorship!

Exhibitors and Sponsors will make our Conference a Huge Success!

On behalf of the National Procurement Institute (NPI) Board of Directors, staff and membership, I would like to extend an invitation to you and your company to join us at NPI’s 43rd Annual Conference and Product Exposition. The conference will be held October 30 – November 2, 2011 at the beautiful Omni Interlocken Hotel in Broomfield (Denver), Colorado. Please consider this my personal invitation for your company to seize the opportunity to be an exhibitor or sponsor.

As a conference exhibitor, you have an excellent opportunity to display your current products and demonstrate the services you provide directly to the individuals who make buying decisions.

We have planned an exceptional program that will offer a variety of workshops including a welcome reception, opening ceremony & breakfast, buyer/supplier roundtable luncheon and the Presidential Gala Dinner.

If you have any special request or questions about exhibiting at the conference, sponsorship or registration please contact me personally at (205) 520-4022 or via email at emcmullen@bhm.k12.al.us or Craig Rowley, Executive Director, at (702) 989-8095. Please feel free to visit our web page at www.npiconnection.org to register today.

Edward McMullen
2nd Vice President, NPI
Exhibit/Sponsorship Chair 2011
CONGRATULATIONS 2011 AEP RECIPIENTS!

The National Procurement Institute congratulates the 177 agencies who earned the Achievement of Excellence in Procurement Award for 2011. These recipients include 41 counties, 57 cities, 20 higher education agencies, 17 school districts, 26 special districts, and 16 state agencies. The award recognizes organizational excellence in procurement by measuring innovation, professionalism, e-procurement, productivity, and leadership attributes of the procurement function. AEP awardees obtain a high score on a rating of standardized criteria.

In addition to NPI, the Achievement of Excellence in Procurement Award is sponsored by the California Association of Public Procurement Officers (CAPPO), Florida Association of Public Procurement Officers (FAPPO), the Institute for Supply Management (ISM), the National Institute of Governmental Purchasing (NIGP), the National Association of State Procurement Officials (NASPO), the National Association of Educational Procurement (NAEP), and the Texas Public Purchasing Association (TxPPA).

Congratulations to all of this year’s winners!

Alachua County Board of County Commissioners, FL
Larry M. Sapp, CPM, CPPB, Purchasing Manager

Alameda County Water District, CA
Gerald Bretag, CPSM, C.P.M., Purchasing Officer

Arapahoe County, CO
Keith Ashby, CPPO, Purchasing Manager

Arizona Department of Administration, AZ
Jean Clark, CPPO, CPPB, C.P.M., CPM, State Procurement Administrator

Arizona Department of Emergency and Military Affairs, AZ
Corry Slama, CPPO, C.P.M., CPPB, Chief Contracting Officer

Arizona State University, AZ
Gina Webber, C.P.M., Associate Director of Purchasing & Business Services

Baltimore County Public Schools, MD
Richard Gay, CPPO, RSBO, Manager

Bernalillo County, NM
Lisa Sedillo-White, Purchasing Director

Bexar County, TX
Daniel Garza, Purchasing Agent

Broward County Board of County Commissioners, FL
Brenda J. Billingsley, Director of Purchasing

California State Polytechnic University, Pomona, CA
Kathleen Prunty, C.P.M., Director, Procurement & Support Services

California State University, Fullerton, CA
Sally Yassine, C.P.M., Associate Director

California State University, Office of the Chancellor, CA
Tom Roberts, Director

Cameron County, TX
Michael Forbes, C.P.M., Purchasing Agent

Central Arizona Project, AZ
Doug Nicholson, CPM, CPPB, Purchasing Supervisor

Central Contra Costa Sanitary District, CA
Stephanie King, Purchasing and Materials Manager

Charlotte County Board of Commissioners, FL
Kimberly Corbett, C.P.M., CPPB, Senior Division Manager - Purchasing

City of Allen, TX
Debra Morris, CPPO, Purchasing Manager

City of Arlington, TX
Debra Twinam, CPPO, CPPB, Purchasing Manager

City of Chandler, AZ
Mike Mandt, CPPB, Acting Purchasing Manager

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<table>
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<th>City of College Station, TX</th>
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<tr>
<td>Cheryl Turney, C.P.M., Assistant Director of Fiscal Services</td>
<td>Cedric Rowan, C.P.M., Manager</td>
<td>Glenn Kaye, C.P.M., Purchasing Officer</td>
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<td>Elton D. Brock, MBA, CTPM, CTCM, C.P.M., Manager, Materials Management and Purchasing</td>
<td>Kathleen Rainey, Manager, Purchasing and Contracts</td>
<td>Bobbye Marsala, CPPO, CPPB, C.P.M., FCPM, FCPA, Purchasing Manager</td>
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<td>Rich Hampton, CPPB, Purchasing Manager</td>
<td>William Ward, CPPO, Purchasing Manager</td>
<td>Cheryl Shanaberger, CPPO, Chief Deputy Director</td>
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<td>City of Edmonton, AB, CANADA</td>
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<td>Dan Lajeunesse, CPP, MBA, Manager, Materials Management</td>
<td>Holly Brock-Cohn, Administrative Services Director</td>
<td>Christine Moody, CPPO, CPPB, Chief Procurement Officer</td>
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<td>Mia Cariaga, CPPB, Assistant Finance Director</td>
<td>Pamela Whala, C.P.M., A.P.P., Purchasing Supervisor</td>
<td>Keri Hinojos, CPPB, Senior Buyer</td>
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<td>Edward Smylie, Purchasing Officer</td>
<td>Jim Ruiz, CPPB, Purchasing Administrator</td>
<td>Pam Kirkland, CPPO, CPPB, Purchasing Manager</td>
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<td>Rick Compau, C.P.M, CPPO, CPPB, Director of Purchasing</td>
<td>Michele Brand, Manager of Purchasing</td>
<td>Ofelia Alvarez, CPPB, Buyer II</td>
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<td>Jack Dale, C.P.M., CPPB, Purchasing Manager</td>
<td>Chris Schroeder, C.P.M., A.P.P., Purchasing Agent</td>
<td>Art Torres, C.P.M., Purchasing/Risk Manager</td>
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<td>Tom Johnston, CPPO, Purchasing Manager</td>
<td>Tina Yoke, C.P.M., Purchasing and Support Services Manager</td>
<td>Jean Farris, CPPB, Supervisor of Procurement</td>
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<td>Carol Cooper, C.P.M., CPSM, CPPO, Director of Purchasing</td>
<td>Michael Bevis, JD, CPSM, CPPO, C.P.M., PMP, Chief Procurement Officer</td>
<td>Richard Brownlee, CPPO, CPPB, Buyer III</td>
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<td>City of Huntsville, TX</td>
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<td>Billie Smith, CPPB, Procurement Manager</td>
<td>Jamie Brockway, MBA, A.P.P., Purchasing Manager</td>
<td>Janie Cantu, TX, CPPO, C.P.M., Director</td>
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<td>City of Irvine, CA</td>
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<td>City of San Diego, CA</td>
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<td>Tracy Hamilton, C.P.M., CPIM, Purchasing Agent</td>
<td>Judy Meisel, CPPO, CPPB, Procurement Manager</td>
<td>Hildred Pepper, Jr., CPPO, Director - Purchasing &amp; Contracting</td>
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City of Santa Clarita, CA  
Jon Bischetsrieder, CPPO, C.P.M., Purchasing Agent

City of Santa Rosa, CA  
Jim Wright, C.P.M., Purchasing Agent

City of Scottsdale, AZ  
Bill Yazel, Purchasing Director

City of St. Petersburg, FL  
Louis Moore, CPPO, Procurement & Supply Management Director

City of Sunnyvale, CA  
Peter Gonda, MBA, Purchasing Officer

City of Tampa, FL  
Greg Spearman, CPPO, Director of Purchasing

City of Tempe, AZ  
Michael Greene, C.P.M., Central Services Administrator

City of Tucson, AZ  
Mark Neihart, C.P.M., CPPB, CPM, A.P.P., Director of Procurement

City of University Park, TX  
Christine Green, C.P.M., Purchasing Agent

City of Victoria, TX  
Gilbert P. Reyna, Jr., CPA, Director of Finance

City of Wichita, KS  
Melinda Walker, C.P.M., Purchasing Manager

City of Winter Park, FL  
Carrie Woodell, CFPCM, CPPO, C.P.M., FCPM, Purchasing Manager

City of Yuba City, CA  
Spencer Morrison, Accountant II

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Bramby Tollen, CPSM, CPPO, Director

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Lonita Collier, CPPO, C.P.M., Director of Business Services

Cleveland Metroparks, OH  
Ron Ciancutti, MBA, Purchasing Manager

Cobb County School District, GA  
Alisa Morningstar, CPPO, Director of Procurement Services

Cochise County, AZ  
David Seward, CPPO, C.P.M., Procurement Director

Collin County, TX  
Franklin Ybarbo, Purchasing Agent

Collin County Community College District, TX  
Cindy White, CPPO, CPPB, Director of Purchasing

Commonwealth of Virginia  
Department of General Services, VA  
Richard F. Sliwoski, P.E., Director

County of Kern, CA  
Jeff Frapwell, Asst County Administrator for General Services

County of Los Angeles – ISD, CA  
Gerald Plummer, Division Manager

County of Loudoun, Division of Procurement  
Donald R. Legg, CPPO, Purchasing Agent/Manager of the Division of Procurement

County of Placer, CA  
Jim Boggan, CPPO, CPPB, Purchasing Manager

County of Riverside, CA  
Robert Howdyshell

County of Roanoke, VA  
Rebecca E. Owens, MBA, Director of Finance

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Craig Rader, CPPO, CPPB, Purchasing Agent

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Laurie Rozko, C.P.M., Director of Purchasing

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Winston McColl, CPCM, Director, Purchasing & Contracting

County of Ventura, CA  
Rosa Ceniceros, C.P.M., CPPO, Procurement Services Manager

Creighton University, NE  
Joe Zaborowski, C.P.M., Director of Purchasing

Dallas-Fort Worth International Airport, TX  
Gregory Spoon, CPSM, Vice President, Procurement

DeKalb County, GA  
Kelvin Walton, CPPB, Director and Chief Procurement Officer

Delta Diablo Sanitation District, CA  
Denni Baumer, C.P.M., CPPB, Purchasing Manager

Denton County, TX  
Beth Fleming, C.P.M., CPPO, Director of Purchasing

District of Columbia, Office of Contracting and Procurement, Washington, D.C.  
James Staton, Acting Chief Procurement Officer

District School Board of Pasco County, FL  
Kendra Goodman, CPPO, CPPB, Purchasing Agent

Frederick County Government, MD  
Harold (Hal) E. Good, CPPO, Director of Purchasing

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<th>Fulton County Government, GA</th>
<th>John Mahin, CPPO, CPPB, CPCP, Purchasing Manager</th>
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<td>Rey Palma, CPPB, MPA, Procurement Services Manager</td>
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<td>Cameron Langner, Procurement Manager</td>
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<td>Roger Ball, Chief, Administrative Services and Corporate Procurement Division</td>
<td>Rick Berry, FNIGP, CPPO, VCO, Executive Director, Construction and Procurement Services</td>
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<td>Nancy Brooks, Director of Purchasing</td>
<td>Debbie Casper, C.P.M., CPPB, Purchasing &amp; Materials Manager</td>
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<td>Robin “Rob” J. Rickard, CPPO, OPBC, Chief Procurement Officer</td>
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<td>Willie Frazier, CACM, CPCM, MA, Supervisor, Central Purchasing Office</td>
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<td>Mark Aanonsen, C.P.M., Senior Purchasing Agent</td>
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<td>Johnny Richardson, CPPO, CFCM, Manager, Purchasing and Contracts Division</td>
<td>Jessica (JJ) Flathmann, CPCM, Director of Procurement</td>
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<td>Phillip Ellison, C.P.M., Executive Director</td>
<td>Brian Garrity, C.P.M., CPPB, Procurement Administrator</td>
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<td>Travis County, TX</td>
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<td>Paul Martin, Assistant VP Administration</td>
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<td>Vick Garmon, Director</td>
<td>Debbie O’Leary, Administrator</td>
<td>Wendy Baudin, MPA, Procurement Manager</td>
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<td>State of Maine, Department of Administrative and Financial Services, ME</td>
<td>University of California, Merced, CA</td>
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<td>Jana Vargas, Director, Procurement</td>
<td>Betty M. Lamoreau, Acting Director</td>
<td>Cynthia Deegan, C.P.M., Director of Purchasing</td>
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<td>San Diego Unified Port District, CA</td>
<td>State of Oregon, Department of Administrative Services, OR</td>
<td>University of Missouri, MO</td>
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<td>Garnet D. Thompson, CPPO, Director, General Services &amp; Procurement</td>
<td>Dianne Lancaster, Chief Procurement Officer</td>
<td>Tony Hall, Chief Procurement Officer</td>
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<td>San Diego Unified School District, CA</td>
<td>State of Utah, Department of Administrative Services, UT</td>
<td>University of Nevada Las Vegas, NV</td>
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<td>Arthur Hanby, CPPO, C.P.M., CPPB, A.P.P., Strategic Sourcing and Contracts Officer</td>
<td>Kent Beers, Chief Procurement Officer</td>
<td>Sharrie Mayden, C.P.M., Director</td>
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<td>State of Michigan, Department of Technology, Management &amp; Budget, MI</td>
<td>Utah Department of Transportation, UT</td>
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<td>Alex Lebedeff, Purchasing Manager</td>
<td>Natalie Spaniolo, Acting Director</td>
<td>Tracie Montano, CPPB, Procurement Services Manager</td>
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<td>School District of Palm Beach County</td>
<td>State of Utah, Department of Administrative Services, UT</td>
<td>Valencia College, FL</td>
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<td>Sharon Swan, C.P.M., Director of Purchasing</td>
<td>Kent Beers, Chief Procurement Officer</td>
<td>Ed Ames, Director, Procurement</td>
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<td>Seminole County, FL</td>
<td>State of Utah, Department of Administrative Services, UT</td>
<td>Virginia Beach City Public Schools, VA</td>
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<td>Ray Hooper, CPCM, Purchasing and Contracts Manager</td>
<td>Kent Beers, Chief Procurement Officer</td>
<td>J. Kevin Beardsley, CPPO, CPPB, Director of Purchasing</td>
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<td>Smith County, TX</td>
<td>State of Texas, Department of Administrative Services, TX</td>
<td>Washoe County, NV</td>
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<td>Kelli L. Davis, CPPB, Purchasing Director</td>
<td>Ron Hack, CFO</td>
<td>Michael Sullens, C.P.M., Purchasing &amp; Contracts Manager</td>
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<td>Tarrant County, TX</td>
<td>Jack Beacham, C.P.M., A.P.P., Purchasing Agent</td>
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You can also visit the AEP section of NPI’s website, www.npiconnection.org, to view the list of winners, photos of the 2011 AEP Evaluation Committee, a sample press release to help your agency promote your achievement, and a 16-year history of agency AEP awards.

Coming soon to the website – the 17th Annual 2012 AEP Application, a schedule of webinars, and Best Practices showing this year’s outstanding submissions.

NPI Announces New AEP Chair, Christine Green, July 2011

The National Procurement Institute is pleased to announce the appointment of Christine Green, C.P.M., to the position of Achievement of Excellence in Procurement Award (AEP) Committee Chair.

Christine replaces Kathleen Bender, C.P.M., CPPB, who is leaving her position in public purchasing as Contract Administrator with the City of Tucson for a position as Director of Contracts and Procurement with privately-held Tucson Electric Power (TEP). NPI wishes Kathleen success in her new position and appreciates her leadership and dedication to the AEP Committee and NPI.

The AEP Chair coordinates the work of the 16-member AEP Committee which has produced the AEP award annually since 1996.

Christine Green has 15 years public procurement experience as the Purchasing Agent for the City of University Park, Texas, a residential suburb of Dallas and home to Southern Methodist University (SMU). University Park has received NPI’s Achievement of Excellence in Procurement Award each year since 2001.

Christine has served on the NPI Board of Directors since 2002, serving currently as Immediate Past President. She has over 20 years experience in local government, beginning with an internship in the City of San Antonio City Attorney’s Office.

Contact Christine at 214-987-5480 or aepchair@npiconnection.org.
PPANCT Announces Scholarship Winners

Every year, the Public Purchasing Association of North Central Texas (PPANCT), a chapter of NPI, sets aside funds for the NPI Conference Scholarship. This year, the Executive Board awarded six (6) scholarships in the amount of $1,200 each to the following members chosen as the most deserving:

Michele Brand, City of Mesquite
Lisa Cloud, City of Lewisville
Becky Dorsey, City of Mesquite
Vanessa Freeman, Denton County
Greg Pervis, City of Cedar Hill
David Setzer, Director of Workforce Development, NCTCOG

Congratulations to all and have a GREAT conference!

Staying out of the Headlines

This article originally appeared in the May 2011 issue of the Government Finance Officers Association’s Treasury Management Newsletter.

Staying Out of the Headlines: How to Run a Successful Purchasing Card Program
By Kent R. Austin, CPFO, and Christine L. Green, CPM

It was every public finance officer’s nightmare—a page one story titled, “School district staffer admits credit card misuse.”

Kevin Karplowski set down his coffee cup and sat a little straighter in his chair, his brain buzzing and eyes widening. He remembered a related headline five months earlier in the same newspaper—“District secretary charges $380,000, has no receipts.”

At the time he had thought, “That can’t be good—but I’m glad it’s not in my city,” and made a mental note to begin a review of his own city’s procurement card program.

Now he was even gladder he had followed through on the review.

Fully alert to the story, Kevin noticed the page one headline’s subheading, “Secretary racked up $100,000 personal tab, agrees to plea bargain.” Even worse, the story continued, the secretary was not alone—five other employees were under investigation, which had started at the school district level and mushroomed into a federal investigation. A series of damning newspaper articles about the district’s procurement card program, backed by months of research, had uncovered the scandal.

Clearly the program had been running with little or no effective oversight. Karplowski stopped to consider the p-card program in his city and the steps his department had taken to ensure it avoided the types of mistakes now splayed across the newspaper pages. As he reflected, he realized there were five key pieces.

Continued on page 11...
1. Back to Basics
At the core of every p-card program is a series of small actions that comprise the larger success. Without these individual elements, the proverbial “blocking and tackling,” a program is destined to fail.

Signed agreements – each cardholder must read and agree to the terms of the card’s use. Each card program has a standard version, but a city may want to modify it or include additional requirements. This is the first of several opportunities to impress upon the cardholder that the card is to be used for business purposes only, and that personal purchases could mean revocation of the card or worse. The p-card should not be released until the employee and their supervisor sign the cardholder agreement, preferably in blood!

Supervisor review of monthly transactions – the last thing most supervisors want amid their other duties is a stack of their subordinates’ p-card transaction reports to review and sign. All too often this important step becomes a rubber-stamp exercise instead of a control opportunity for regular review and inquiry. Rather than simply sign the report listing the month’s purchases, a supervisor should look for the story the report is telling—“if I were a reporter who had gotten my hands on this, what would I find?” A series of questions should enter the reviewer’s mind: What exactly is being bought here? Do the receipts support the total amount? Is there an itemized receipt or just a credit card carbon? Speaking of which, on these restaurant transactions, how many beers were charged? What account number is this purchase being coded to? Is the report on time and complete?

Use of card limits and controls – One advantage of p-cards over other forms of purchasing is that they can be configured with dollar transaction limits (e.g., $500 per transaction and $5,000 per month) and controls over different merchant categories (e.g., blocks on casinos and jewelry stores)\(^1\). While this is helpful, care should be taken not to over-rely on these higher level controls. A great deal of mischief can be had at perfectly legitimate establishments, such as employees buying auto parts for their personal vehicles. Further, many times the merchant category blocks become as much hindrance as help—appropriate purchases may need to be made from prohibited classes of businesses, such as the police department buying bullets from a sporting goods store.

2. Watch for red flags!
Mistakes can happen with even the most conscientious cardholder. Think of the airport baggage warning that ‘many bags look alike,’ so that you are taking yours and not someone else’s suitcase. Similarly, at a glance a p-card in someone’s wallet may look just like a personal credit or debit card. So a personal purchase that appears on a p-card transaction report may be perfectly explainable. In such a case, the cardholding employee must quickly repay the city, and the situation must be documented.

When this type of event happens multiple times, however, the honest mistake excuse quickly wears thin. Whether the cardholder is using the city’s p-card to get them by a tough month or is simply absentminded in which card is used, the response is the same: see the red flag, drill down, and take action.\(^2\)

Other red flags include consistently late or incomplete monthly reports and difficulty finding supporting paperwork for card transactions. Be on guard for disproportionate cardholder defensiveness when asked for more detail. No matter the workload or press of other duties, a supervisor must be alert to the red flags that may help staunch a larger p-card problem.

Take advantage of standard reports available from most credit card companies to help spot unusual activity: Account Activity Reports, Declined Authorization Reports, Disputes Reports, Unusual Spending Activity Reports, and Lost/Stolen Card Reports can highlight patterns of activity that may be a red flag.

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3. Send them back to school!
Even experienced employees need occasional reminders about the hows and whys of p-card use. The City of University Park, Texas, conducts periodic buyer education classes for City p-card users. The classes cover not just card use but broader purchasing issues, like ethics, controls, and statutory authority; a quiz is conducted at the end of class to test employee retention of the concepts presented. Completion of the class is required to maintain purchasing privileges. Examples of topics covered include: Methods of Payment; Obtaining Quotes; Bids, Best Value Bids, and RFP; Cooperative Purchasing; and Annual Contracts.

Apart from classes, making reference materials available is helpful. The National Purchasing Institute (NPI) advocates maintaining a procurement card manual electronically on a shared drive or intranet webpage to ensure that cardholders have access to the policies they accepted on the cardholder agreement.

4. Pull the plug
Sometimes the only prudent remedy to cardholder problems is to revoke the employee’s p-card. Many times an organization may be unwilling to take this step, seeing it as too drastic or embarrassing to the employee. These concerns must be weighed against the potential damage from inappropriate and illegal use.

Kevin recalled an instance in his own organization when an employee’s card was revoked for misuse. The card had been used without his knowledge, in person at a retail chain store. The employee claimed that the purchase was fraudulent, so the card was cancelled and a new one issued. Several weeks later, the situation repeated itself. The employee was confronted. He conceded that personal financial problems may have led his wife to use his card without his knowledge. The employee reimbursed the organization for the charges, but his card was revoked.

In this example, failure to maintain control of the card led to the revocation of the employee’s purchasing privileges. When an employee’s name is on the card, the employee is solely responsible for all transactions attributed to it. Consequences for improper card use or fraud should signal other cardholders that someone is watching—an important element of the overall control environment.

5. Invite the auditor
Similar to looking through monthly reports like a journalist seeking a scoop, the best p-card defense may be a proactive offensive move—inviting an auditor to review your program. In large organizations, this could be a dedicated internal auditor who reports to someone outside the finance department. In smaller organizations, the auditor could be a finance official outside the card program, or even an employee from another department. NPI recommends that the audit be conducted by a source not involved in the administration of the p-card program. The most rigorous review would come from an independent third-party auditor, perhaps as an adjunct to the annual external financial audit.

Before any outside review, of course, the p-card administrator and department director will want to scrutinize their program and take action to ensure the success of the review. Even if deficiencies are found, at least they are found when they can be remedied and before a newspaper expose does the job for them!

Kevin stood up and headed to the break room for another cup of coffee. Whatever else was on his mind that day, at least a p-card scandal wasn’t one of them.

Notes:
AEP Brings Recognition to School District

Clayton County Public Schools in Jonesboro, Georgia has received the most prestigious award given in the area of governmental procurement, Achievement of Excellence in Procurement from the National Procurement Institute, for fiscal year 2010. As a recipient for the 3rd consecutive year, the win is a significant achievement for Clayton County Public Schools procurement staff, especially for the director, Lonita Broome Collier. Ms. Collier stated the award has pushed the procurement department to a new level of organization, tracking of cost savings, professional development, productivity, e-procurement and leadership.

Ms. Collier indicated applying for the award required tracking mechanisms were in place to ensure the organization maintained focus on the true purpose of the procurement department in analyzing purchases, consolidating and cost savings. The application also required that training be ongoing, conducted with both internal and external customers, and that appropriate e-procurement tools were in place for the operation to run effectively and efficiently while streamlining processes and procedures.

As a result of applying for and maintaining the high standards required to receive the award, the procurement department has improved its processes, procedures, training, and leadership which has resulted in better use of technology, noticeable cost savings, improved customer service, consolidation of common used items and the utilization of cooperative purchasing.

Three years ago the purchasing director was not invited to sit at the table for cabinet meetings. Today, the District understands the role and contributions the procurement department makes, and not only celebrates with the procurement department for receiving this esteemed award, but has invited the Director of Procurement to join Cabinet and have a seat at the table to provide input in the plans governing the direction of the District’s future.

Lonita Broome Collier, CPPO, C.P.M.
Director of Procurement
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