

NIGP- Utah Chapter

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NIGP- Utah Chapter Officers:

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Procurement News

Procurement News

February 2011

Chapter President's Message

Fellow Colleagues:

Purchasing Month

It was my pleasure at our January meeting to associate with many of you as we started this new year together. As most of you are probably aware the month of March is "Purchasing Month." No it is not on the calendar along with St. Patrick's Day, but we are working on it.

This annual declaration is an opportunity for us as purchasing professionals to promote the value of our profession. We all recognize the strategic value an effective procurement office can add to a government with declining budgets. Unfortunately, not all organizations recognize this. This month is an opportunity to shine a light on the efforts you work each day to push forward. I encourage each of you to recognize Purchasing Month in your organization. Be creative and try to find opportunities to share accomplishments of your department.



Jared Gardner- President

Values and Guiding Principles of Public Procurement

At our January meeting you were introduced to the document *Values and Guiding Principles of Public Procurement*, which was created by a national task force under NIGP-national. This document was developed to help obtain the vision of creating a world where the public procurement practitioners are respected as members of a professional order.

Our board has recognized the value of this document and has voted to adopt it. We believe it establishes a strong foundation upon which we can structure ourselves as a chapter, within your organizations, and as individual practitioners. I encourage each of you to review the document and contemplate how personal adoption and application could benefit your career and your organization.

For more information on this exciting movement please visit: <http://www.principlesandpractices.org/>. For those who were not able to attend in January or those who would like to access the document electronically it is available via our chapter web at this link: <http://nigputah.org/docs/values.pdf>.

Thank you for all you do for our profession,

Sincerely,

Jared Gardner, CPPO, C.P.M.
President, NIGP Utah Chapter



Utah Chapter News

MARCH IS PURCHASING MONTH!!! Help celebrate our profession by participating in our crossword puzzle activity, which is attached to this newsletter. Please bring your crossword puzzles, completed to the best of your ability, to our March 15th chapter meeting. Those participating will receive a prize! Good Luck!

NIGP NATIONAL has recently made several new online courses available. For more information on these courses, visit www.nigp.org , or email customer-care@nigp.org

Basics of Business Math *Business Communication- Written Communication*

Fundamentals of Business Management *Leading High-Performance Teams*

Negotiating Skills- Influence and Persuasion *Project Management*

Time Management Fundamentals

VOLUNTEER to serve on a chapter committee! If you are interested, please contact the committee chairperson listed below:

Committee Chairpersons

Honors & Awards: Kurt Prusse (Weber SD) kuprusse@weber.k12.ut.us

Financial: Mark Parry (State Purchasing) mparry@utah.gov

Historian: Kate Fotsch (U of U) kfotsch@purchasing.utah.edu

Membership: Stephen Elms (Draper City) steve.elms@draper.ut.us

Marketing/Public Relations: Trever Ward (UDOT) tward@utah.gov

Education: Tracie Montano (UDOT) tmontano@utah.gov

Nominating: Glendon Mitchell (SL County) gmitchell@slco.org

"Do what you can, with what you have, where you are."

-Theodore Roosevelt

Upcoming Meeting Dates

(All meetings are held at 9:00 AM at the SL County Building, room S1007 [2100 S. State] unless otherwise posted. PUBLIC PARKING is available in the parking structure if outside lots are full.)

March 15, 2011:

Bonding

- Jeff Rowley, Dir. Of Risk Management, SL County
- Troy DeLuca, MBA, Regional Surety Manager, GCNA

Welcome Address

- Mayor Peter Corroon, Salt Lake County

What's Your Problem?

- Kurt Prusse, Weber School District

Share Your Success Story

- Jared Gardner, Granite School District

May 17, 2011:

Topic and Speakers TBD

Classroom Corner

(Used with Permission)

Procurement Processes and Vendor Communications- by Glendon Mitchell, C.P.M., CPPO

Have you ever been assigned to make a purchase that will require a competitive process and had questions regarding if and when you should approach vendors for information? Do you generally know what types of questions you should or should not ask? Have you ever been approached with a question by a vendor during a competitive solicitation process and wondered what you should or should not say? Here are some simple guidelines:

DISCOVERY OR REQUEST FOR INFORMATION STAGE

It is generally necessary to research information as a future purchase is anticipated. This process assists in gathering broad market information and availability on the desired goods or service as well as discovering sources of detailed information that could be useful in the development of the solicitation. Effective tools can

be Internet searches, phone calls or even discussions with vendors but please remember to research multiple sources. Proprietary specifications often result when only one vendor is researched.

ESTIMATED PRICE

Estimated price(s) may also be requested during the discovery or request for information stage for budgetary and planning purposes but it is critical that vendors know the pricing request is merely for a budgetary estimate. Please do not ask for a Price Quote as that could create future problems for either you or the vendor or both.

SPECIFICATION OR PROPOSAL WRITING STAGE

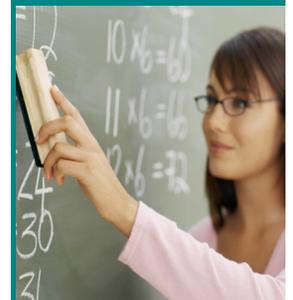
To maintain a fair and level approach with vendors, it is generally recommended to discontinue the discovery or request for information stage and corresponding communications with vendors while bid specifications or Request for Proposal (RFP) documents are being written. This minimizes the chance that a vendor may have undue influence on the solicitation. Please

contact the buyer you are working with at Contracts and Procurement if you find you need more information from vendors while the solicitation is being written. Consultants under contract with your organization that assist in specification or proposal writing will not be considered as an eligible bidder due to the obvious conflict of interest.

SOLICITATION STAGE

Once a bid, quote or RFP solicitation has been released by the Purchasing Department, all communication with vendors interested in responding should be directed as instructed in the solicitation. Questions are generally directed to the buyer in Purchasing Department. If vendors approach personnel in your division with questions, please ask that the inquiry be redirected per instructions in the solicitation. This is critical to ensure that some vendors are not given an advantage (or disadvantaged) by information that is given to one potential bidder but not all. Additionally, as you know, only the written text in a bid or RFP document is binding so non-binding verbal (cont.)

*"To maintain a fair and level approach with vendors, it is generally recommended to discontinue the discovery or request for information stage and corresponding communications with vendors while bid specifications or Request for Proposal (RFP) documents are being written."
- Glendon Mitchell*



Classroom Corner (cont.)

statements only have a potential to create problems. Generally there is a cut-off date and time for submittal of questions, after which no further questions are considered.

AWARD STAGE

After bids have been submitted to Purchasing Department and an award recommendation has been made and publicized, agencies may give

The name and date of the awarded vendor to other vendors when requested. Any other requests such as copies of written documentation, debriefings, etc., should be directed to the buyer in the Purchasing Department. As some documents are public information and others are not, please have the buyer handle the request.

POST AWARD STAGE

Please contact the buyer in the Purchasing Department for assistance when requests for information are made after a purchase has been finalized which would include requests for copies of the PO or contract.

About the Author

Glendon Mitchell currently serves as Procurement Manager for Salt Lake County.



March is PURCHASING MONTH !!!

NIGP National Member Resources

NIGP National has a number of member-exclusive resources for national members. These resources include:

- The NIGP Resource Library, containing RFP documents, templates, forms, etc for RFP development.
- The VAULT- an active repository of documents including the latest analysis, market moving news, and sector insights
- MEASURE- tool for recording and reporting on delivered savings.
- Online Supplier Directory
- Discussion Lists- collaborate with fellow members online in the "PurchIssues" community or through list groups including: chapters, diversity, green, higher education, K-12, Legislative, Technology, and Techspecs.
- Contact-An- Expert
- Membership Directory

(Please see GO PRO magazine, December/January 2011 issue, page 58 for additional details)

Special Notes / Announcements

Please Note:

Our next chapter meeting will be Tuesday, March 15, 2011. See you there!



Special Notes / Announcements (cont).

What's Your Problem?

We would like to include a discussion session at each chapter meeting called "What's Your Problem". We would like to get your questions, feedback, input, suggestions, etc. for this portion of our chapter meeting.

Please send any topic requests, questions, etc. to Kurt Prusse at kuprusse@weber.k12.ut.us.

Thank you in advance for your participation and input.

UDOT Tenth-Annual Product Fair

You are invited to attend UDOT's annual product fair Wednesday, March 23, 2011. 8:00 a.m. to 1:00 p.m.

Location: UDOT's MTF Building, 4501 South 2700 West, Salt Lake City, Utah. (Located East of the main building).

Come and meet with prospective vendor representatives, and see available products for your organization!

Share Your Success Story

At our March meeting, we would like to take 5-10 minutes of time to allow for a member of two to share a recent procurement success story. We spend so much of our time in our sessions talking about how to improve and how to do things differently that I fear we miss the opportunity to hear about the positive results of your efforts.

If you would feel comfortable taking a couple of minutes to share a success story with us, please send me an email at jbgardner@graniteschools.org.

Jared Gardner, Chapter President

Upcoming NIGP Webinars

(\$75 for Members/\$105 for Non-Members. Register at www.nigp.org)

Thursday, Mar 03, 2011: *How to Apply for the Annual Achievement of Excellence in Procurement Award*

Tuesday, Mar 15, 2011: *Legal Aspects of IT Procurement: Software Licensing*

Thursday, Apr 14, 2011: *Legal Aspects of IT Procurement: IT Contracts*

(On-Demand Webinar Recordings are also available for purchase in the NIGP Online Store)

For newsletter submissions or comments, please contact Tonya Hodges, Newsletter Editor:

Phone: 801-578-8261 ; Email: tonya.hodges@slcschools.org

Speaker Biographies (Selected)

M. Jeff Rowley, MPA, ARM

Jeff Rowley has been working in the public entity risk management field since 1993. Since that time he has worked for the State of Utah, Salt Lake City and Salt Lake County where he has served as the Director of Risk Management since 2005. Over the past fifteen years, Jeff has gained experience working in both insured and self-insured environments. As a public entity Risk Manager he has been involved with several state legislative issues and he currently serves on the Utah Labor Commission's Workers' Compensation Advisory Council.

Jeff received his bachelors degree in business management from the University of Utah and completed a masters of public administration from Brigham Young University this spring. He is a frequent speaker on risk management topics and former board member for both the local chapters of RIMS (Risk & Insurance Management Society) and PRIMA (Public Risk & Insurance Management Association).

Jeff is blessed with a wife and four children at home, one of which was adopted at age 6 from Haiti. He enjoys the great outdoors and particularly water sports such as scuba diving and white water rafting. He also enjoys a good challenge and the learning process. He is currently gaining new incites into the importance of leadership and risk management in all facets of a persons life under the tutelage of his two teenage children.

Troy DeLuca, MBA, Regional Surety Manager, The Guarantee Company of North America, USA (GCNA)

I was born and raised in Utah. I currently reside in South Jordan. I am a graduate of the University of Utah where I obtained my B.S. in Finance and then subsequently received my MBA from The University of Phoenix. I have been in the surety industry for over 14 years. I have worked both on the company and agency side of the surety business. I am currently the Regional Manager for The Guarantee Company of North America, USA and have been for two years. I am a member of The Surety Association of Utah where I have served as President and VP. I am also an affiliate member of the Association of Builders and Contractors (ABC), Association of General Contractors (AGC) and National Association of Surety Bond Producers (NASBP).

Mayor Peter Corroon, Salt Lake County

Peter Corroon was elected in November 2004 as Mayor of Salt Lake County, Utah's second largest government. He was re-elected in 2008, with 66 percent of the vote.

Throughout his tenure, Mayor Corroon has consistently prioritized quality government through fiscally responsible policies that reflect his goal of an open, honest, and ethical government, and economic development policies to create better, higher paying jobs.

Mayor Corroon has proven to be fiscally conservative. In 2009, He bucked his own party and vetoed a tax-increase and shaved over \$140 million from the net County budget and reduced its workforce by 300 employees.

Economic development, particularly building opportunities for small and medium sized Utah businesses has been a priority for Mayor Corroon.

Mayor Corroon also recognizes that one of Utah's greatest assets is our natural environment, and believes that being a good steward of our air and water quality is critical for Utah's long-term success.

The Mayor has a strong environmental record and has overseen Salt Lake County's commitment to LEED (Leadership in Energy and Environmental Design) certification for all new construction. He introduced solar panel generation at the Clark Planetarium, Calvin L. Rampton - Salt Palace Convention Center and future county construction projects.

In addition to being mayor of Salt Lake County, Mayor Corroon also serves as a board member for the National Association of Counties, the United Way, the Economic Development Corporation of Utah, the Utah Technology Council and the Utah State Board of Tourism.

Peter has a bachelor's of science degree in Civil Engineering, a master's degree in Real Estate Development and Finance and a Law degree. He lives in Salt Lake City with his wife, Amy, and their three children. They all enjoy recreation, church and school activities together.

