



NIGP- Utah Chapter

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NIGP- Utah Chapter Officers:

President: Glendon Mitchell, C.P.M., CPPO

Vice-President: Tiffany Sorensen, CPP

Secretary: Mike Rigby

Treasurer: Gayle Gayler

Past President: Paul Mash

Board of Directors:

Jared Gardner, C.P.M., CPPO

Carol Heales

George Brinkerhoff

Chapter President's Message

Fellow Colleagues,

Due to budgetary constraints and other factors, public entities which we each work for continue to face increasing performance pressures. Often this comes with limitations or reductions in our resources. How often do we each hear, "Do More With Less". Demands on public purchasing and accountability seem to only increase and some aspects of a public purchasing process are now front page news in Utah. Changes over the past few years in the Utah Government Records Acquisition Management Act or GRAMA as it is often referred to, increases our responsibility and workloads to provide transparency to stakeholders, interested parties and the public.



Glendon Mitchell- President

I've written in the past and want to continue to emphasize the importance which we have as a profession and as individual agencies/offices/divisions in our various organizations to properly promote the value and importance of the services provided by public procurement. Purchasing functions often go un-noticed by our administrations unless there is a procurement complaint or problem. Wouldn't we be better served if our administrations were hearing more often about successes, savings, and improvements provided by well planned and executed procurements that deliver quality products and services in a timely manner? How can you further improve those communication processes, increase awareness and, frankly, better market the importance and savings results made by procurement to your organization?

We have a great opportunity to learn from Marcheta Gillespie, 3rd Vice President of NIGP this month at chapter meeting. She has been gracious to travel from Arizona to share portions of her Forum presentation to us in her presentation to our chapter entitled, Creating Legendary Savings in Your Organization.

Jonathan White from Spikes Cavell will also be presenting at our chapter meeting a new software product for NIGP members called MEASURE. This is a tool for recording and reporting on delivered procurement savings and efficiencies. This enables purchasing entities to clearly communicate the value their procurement team brings to the organization. You won't want to miss this chapter meeting.

As we are completing our current term as chapter officers, I would like to thank all who have volunteered to serve as officers and on committees. We have made great progress as a chapter and benefited from excellent trainings thanks to the generous efforts of many. Without listing names, THANK YOU to each for your contributions.

I look forward to seeing each of you on Oct. 19th and appreciate your participation in the upcoming election process.

Keep buying with a smile,

Glendon Mitchell, President
NIGP Utah Chapter

Utah Chapter News

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

Committee Chairpersons

Honors & Awards: Paul Worthen (Granite SD) paul.worthen@granite.k12.ut.us

Financial: *Currently Looking for a Volunteer!*

Historian: Mindi Bos (Sandy City) mbos@sandy.utah.gov; 801-568-7148

Membership: Stephen Elms (Draper City) steve.elms@draper.ut.us;
801-576-6514

Marketing/Public Relations: Greg Maynard (SLCSD)
greg.maynard@slc.k12.ut.us; 801-578-8264

Education: Tracie Montano (UDOT), tmontano@utah.gov; 801-964-4534

Nominating: *Currently Looking for a Volunteer!*

WELCOME to our newest chapter members! We're glad to have you join us!:

Susan Paiz- Metropolitan Water District of Salt Lake and Sandy

Rosemary Frenchwood- State of Utah, Office of Education

Jeremy Kendall- State of Utah, Office of Education

Katy Abildskov- State of Utah, Office of Education

THANK YOU to those who have offered to volunteer for the coming year:

Tracie Montano (UDOT) - Education Committee

Rebecca Collins (UDOT) - Education Committee

Tonya Hodges (SLCSD) - Newsletter Editor

Paul Kikuchi (UDOT) - Refreshments / Marketing Committee

Joe Bryant (SL County) - Audio/Visual Support

Elizabeth Bayler (SL County) - Badges/Lanyards

Paul Worthen (Granite SD)- Honors & Awards Committee

Steve Elms (Draper City)- Membership Committee

Mark Perry (State of Utah)- TBD

Katie Fotsch (UofU) - TBD

JoAnna Reese (State of Utah, DFCM)- TBD

Upcoming Meeting Dates

(All meetings are held at 9:00 AM at the SL County Building, room S1007 [2100 S.

October 19, 2010:

Creating Legendary Savings in Your Organization

- Marcheta Gillespie, CPPO, C.P.M., CPPB,
CPM, City of Tucson

NIGP's Observatory's MEASURE

- Jonathan White, Territory Manager
Spikes Cavell

November 4, 2010:

EdPAC Workshop



"Effective leadership is putting first things first. Effective management is discipline, carrying it out."

-Stephen Covey

Classroom Corner

(Reprinted from GovPro.com, and April/May 2010 magazine, p. 16-22: http://govpro.com/resource_center/procurement_prof/open-competition-201004-05/index.html)

Part 2: Open Access for All- Preserving Procurement Integrity While Getting the Best Value From Suppliers- by Paul Campbell and Richard Rector

Perception Versus Reality

It is ridiculous to think that government officials are so easily manipulated or influenced that a simple meeting with an industry representative could somehow hijack the entire competitive bid process. The issue is mostly one of perception, not reality. But as we all know, perception is reality where politics is concerned.

At the federal level, this issue was addressed during the 1996 revision of Federal Acquisition Regulation (FAR) Part 15, "Contracting by Negotiation." Balancing the dual goals of "openness" and "integrity" in the procurement process, the FAR drafters decided to specifically encourage pre-RFP meetings and exchanges of information between public officials and potential

vendors (see *Federal-level procurement guidelines sidebar*, page 20).

In fact, the federal rule not only encourages early exchanges of information with vendors but also specifically identifies "one-on-one meetings" as an appropriate means of accomplishing these exchanges. There are important caveats in the rule to ensure fair treatment of all vendors and to make sure that procurement integrity rules are followed. There is also a helpful, bright-line test on when these open exchanges should stop (i.e., "After release of the solicitation, the contracting officer must be the focal point of any exchange with potential offerors" — emphasis added.)

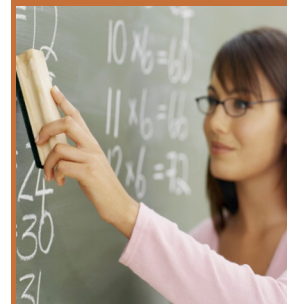
The National Institute of Governmental Purchasing (NIGP) also encourages an open dialogue with suppliers. "There is tremendous value to be gained when buyers and suppliers freely exchange information in support of an improved mutual understanding of the business challenge at hand and the solutions available to meet that challenge," says Chief Executive of the NIGP Rick Grimm. "Mitigating the risk of real or perceived 'undue influence' is a paramount consideration for every public procurement professional. A policy of equal access to information and a formal RFI help to ensure the

integrity of the solicitation process in its early stages."

The National Association of State Procurement Officials (NASPO) has also recognized the value of getting appropriate vendor input prior to a procurement, stating: "[t]he central procurement office should develop guidelines for vendor input into the process of determining agencies' needs or preparing initial specifications or scopes of work, so that the agencies and the central procurement office may obtain the benefits of vendor expertise without creating unfair bias or a conflict of interest."⁷ NASPO further notes that "communications should never give vendors an opportunity to gain an unfair advantage, to acquire information their competitors do not have, or to unduly influence decisions at any stage of the procurement process"; and "[c]ommunication with vendors should be on an open, available-to-all basis."⁸

The overall message to public officials is clear: Feel free to exchange information openly and freely with vendors prior to a solicitation being issued; just be sure to treat all vendors fairly. (cont.)

"There is tremendous value to be gained when buyers and suppliers freely exchange information in support of an improved mutual understanding of the business challenge at hand and the solutions available to meet that challenge."
- Rick Grimm



Classroom Corner (cont.)

Balancing Openness and Integrity

Admittedly, discretion must be exercised to balance the objectives of "openness" and "integrity." We can all agree that a public official should not disclose a confidential government strategy. However, let's say a state official meets with vendors before issuing a solicitation to understand leading practices and innovative new solutions. The state official may also wish to gather benchmarking information such as what has worked in other states and how those approaches may apply in her state. These discussions require the procurement official to share her high-level goals for the program, what will define success on the project and what the state perceives as the largest barriers to success. All of these are legitimate objectives for a meeting and do not disclose a confidential government strategy.

However, unless the state official reads from the same script for every vendor meeting, and every vendor asks exactly the same questions, she may share information with one competitor that she does not share with another. Does this mean she has allowed

one vendor to improperly acquire information that other competitors do not have?

The only reasonable answer to this question is no. The metric of providing "equal information" to all, if strictly construed, would be impossible to meet or enforce. Moreover, it would prevent the kind of discussions that lead to the best, most cost-effective solutions. The standard for a fair process is not "equal information" for all, but equal access for all. This concept is captured at the federal level as follows: "All contractors and prospective contractors shall be treated fairly and impartially but need not be treated the same."⁹

Providing equal access to potential vendors is also consistent with the goal of greater transparency. It is easier to monitor and document and, therefore, permits greater accountability. When access is the standard for fairness, the procurement official is not at risk of improperly meeting with a vendor regarding an upcoming procurement or of disclosing information that is not precisely the same to each vendor. Rather, as long as the procurement official treats all potential vendors impartially and provides equivalent access to all, the process is fair.

(The remainder of this article will be reprinted in future newsletters)

End Notes

7. NASPO State and Local Government Purchasing Principle and Practices, 2008.
8. NASPO State and Local Government Purchasing Principle and Practices, 1997.
9. FAR 1.102-2 (d).

About the Authors

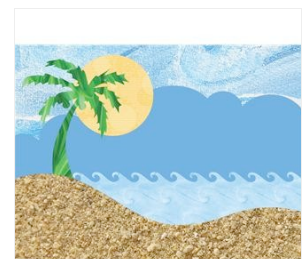
Paul J. Campbell has public sector experience as a Federal Agent investigating contract fraud and as District Attorney and Chief Purchasing Officer for the State of Illinois.

Richard Rector chairs DLA Piper's Government Contracts practice and focuses his practice on federal, state and local procurement issues.

Special Notes / Announcements

Please Note:

Our next chapter meeting will be Tuesday, October 19, 2010. Please come and vote for our new Chapter Officers!



Special Notes / Announcements (cont).

NIGP Chapter Meeting Attendance Roll

As you know, attendance at NIGP Utah chapter meetings is self reported on a roll that is at each meeting. If you missed marking the roll at a past meeting, you are welcome to mark your attendance at an upcoming meeting, or you can email Steve Elms (Draper City) at: steve.elms@draper.ut.us .

Please take a minute to review your information as listed on the roll for accuracy including email address, phone numbers, etc.

Thank you in advance for checking the 'details'.

A Big "Thank You"

We want to express our sincere appreciation to those who have volunteered to run for chapter offices, or to participate on various committees. Your service and commitment to our growing chapter is greatly appreciated, and we are all rewarded by your efforts. Without your assistance, our chapter could not operate, and we wouldn't have the wonderful collaboration we currently experience.

We are also grateful to those who have served us so well this past year in the chapter. We appreciate your efforts and leadership, and look forward to continued relations with you in our chapter meetings!

And of course, thanks to all of our members for your participation!

Upcoming NIGP Webinars

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

| | |
|-------------------------|---|
| Thursday, Oct 14, 2010: | <i>Show Them the Money! Ways to Find Savings In Your Organization</i> |
| Tuesday, Oct 19, 2010: | <i>Do I Have to Take the Low Bid? Tools for Obtaining Qualified Contractors</i> |
| Tuesday, Nov 09, 2010: | <i>Understanding Local Preference: The Pros and Cons</i> |

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

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

MEET THE CANDIDATES

(Floor Nominations will also be accepted at the Chapter Meeting)

CHAPTER PRESIDENT:

Jared Gardner, CPPO, C.P.M.- Granite School District



Mr. Gardner is the director of purchasing for Granite School District. In his current position he has responsibility for all purchasing, warehousing, and mail services for the school district. Prior to his appointment with Granite he spent 12 years with the State Division of Purchasing. He obtained a bachelors degree in business management from the University of Utah and a masters degree in public administration from Brigham Young University. He earned his C.P.M. certification in August 2003 and his CPPO certification in March of 2007.

He would not be where he is today if it were not for his wonderful wife Melissa and his four incredible children. Time away from the purchasing world is spent with his family camping, hiking, fishing, and hunting.

VICE PRESIDENT:

Kurt Prusse – Weber School District

Kurt Prusse is the Purchasing Agent for Weber School District in Ogden, Utah. He is in his second year in public procurement after spending over three years gaining valuable experience managing the purchasing duties of two companies in the private sector. Before entering the field of procurement, Kurt cut his teeth in the sales arena, spending over six years working in a variety of industries, namely educational fundraising, network hardware solutions, and admissions recruiting for a private college. He received his BA in managerial economics from Utah State University and is currently exploring graduate school opportunities for a MBA program. Before graduating from college and working in the “real” world, Kurt was a member of the United States Bobsled Team for three years and participated in the 2001 Olympic Trials in Park City, placing 4th in the four-man event. Kurt is married to his beautiful wife, Monica, and has been blessed with four wonderful children, three boys and a little girl, and resides in Farmington, Utah. He has enjoyed participating in the chapter meetings for NIGP this past year and has learned a great deal about public procurement in the process. Learning from such an experienced group of procurement professionals has been a real education and he is looking forward to serving the members of our local chapter.



SECRETARY:

Kay Healey- Alpine School District

Education: University of Phoenix, Bachelor of Science Business Administration, Business Management Major

Graduation Date: September 1994

Utah Valley Community College, Orem Utah, Associate of Science Degree, Graduation Date: July 1991

Utah Technical College, Provo Utah, Electrical Automation Technology Certificate, Completion Date: June 1978

CPM Certified Purchasing Manager Certification

34 years of experience with Alpine School District and over 13 years experience in purchasing, warehousing, and mail / media delivery.

Also worked to organize UCARE, (Utah Cooperative Acquiring Resources Effectively). UCARE is a cooperative in the State of Utah to purchase food for 12 school district Nutritional Services programs.

TREASURER:**Gayle Gayler- Salt Lake County**

Gayle entered the workplace in 1987 after raising her eight children. This was a great foundation for organizational and purchasing skill development! She worked in the private sector for twelve years; her duties were diversified to include inventory control, purchasing, office management, accounting and reconciliations, to name a few. She started with Salt Lake County Contracts and Procurement in February of 1999 as the Office Coordinator. In January of 2002 she was promoted to Junior Buyer. She currently serves on both the Utah Supplier Development Council (USDC) and the National Institute of Governmental Purchasing (NIGP) Boards as Treasurer. She enjoys reading, entertaining and traveling.

BOARD OF DIRECTORS (TWO POSITIONS AVAILABLE- [3 year and 1 year]):**Greg Maynard, CPPO, C.P.M., MBA- Salt Lake City School District – 3 year position**

Gregory (Greg) Maynard is currently the Purchasing Supervisor for the Salt Lake City School District. Prior to joining the school district, Greg worked for PacifiCorp for twenty one years where he specialized in the purchase of computer hardware and software. He has also worked for the Utah Transportation Authority and South Jordan City.

He holds the C.P.M. lifetime certification from The Institute of Supply Management and the CPPO certification from The NIGP. He also has an MBA from Brigham Young University.



“I am asking for your vote for one of the two vacant Board Member positions because I strongly believe in the purpose and goals of the Utah Chapter. As a founding member of the chapter, I have a vested interest in its success. I also enjoy meeting with such competent people comprising the officers & committee chairs of the Chapter. I also believe in service to others and feel that as a board member I can better serve you, my fellow procurement professionals. Thank you for your support.”

Adrian Ruger, C.P.M.- State of Utah Div. of Purchasing- 1 year position

I started my federal career in 1974 as a clerk for the U.S. Postal Service. My procurement experience began in 1983 as a supply clerk in Pocatello, ID. A year later I was promoted to the supervisor of the procurement section. In 1986, I relocated to Salt Lake City where I worked in a district procurement and contracting office in various purchasing positions until 2005. In these positions, I procure all types of supplies and services, eventually specializing in design and construction contracting. In 2004, I completed my CPM certification with the Institute of Supply Management. In May 2005, I was promoted to a facilities contract specialist position in Denver, CO. In February, 2008, I transferred to the Bureau of Land Management back in Salt Lake City, as a contract specialist. During that time I received my lifetime CPM Certification. I retired from the federal government in May 2008, and started with the State of Utah Division of Purchasing three weeks later.....You know the rest!!

Speaker Biographies (Selected)

Marcheta E. Gillespie, CPPO, CPPB, C.P.M., CPM; 3rd Vice President, NIGP and Deputy Director of Procurement, City of Tucson:



Marcheta E. Gillespie, CPPO, CPPB, C.P.M., CPM, is the Deputy Director for the City of Tucson's Department of Procurement. With over 18 years of experience in public procurement, Marcheta is a passionate advocate for her profession. Her areas of expertise include organizational leadership, public sector contracting, strategic planning, project management, cooperative programs, system and program implementations and marketing.

Recently elected as the 3rd Vice President of the National Institute of Governmental Purchasing (NIGP), Marcheta has served on the NIGP Board of Directors since 2007. She is the Chair of the Guiding Principles National Task force for NIGP, tasked with developing procurement principles for the profession. She has also served as the Chair of the NIGP National Forum Committee, Chair of National Quality Control Team and is an active member of the NIGP Southern Arizona Copper Chapter. As one of the leaders for the Student Knowledge Community for NIGP, she is focused on reaching out to the student population to educate them on the opportunities in the procurement profession. Marcheta has spoken at dozens of national, regional and local conferences, has created a number of training programs and is a certified instructor for NIGP. In 2009, Marcheta was selected as the NIGP Copper Chapter Manager of the Year.

Marcheta is heavily involved in working with youth in her community. She helped create a local club baseball team, has served as a charter member of the Marana Optimist International Club, has served on the Board of Directors for Marana Little League and has been a long standing PTO Board member for various schools. Married to husband Allen for 17 years, they have 3 children (Makayla, Garrett and Felicia).

Jonathan White, Territory Manager, Spikes Cavell:



Jonathan White is originally from Ohio but has been working in data and spend analysis exclusively for the public sector for three years with Spikes Cavell in the United Kingdom. He has recently moved back to the United States for the first time in ten years with his wife and children to head up the US operation. Spikes Cavell is one of NIGP's strategic partners and the provider of the NIGP Observatory and Measure.