

July 27, 2015

Katherine Bosdell, CPPB, VCO  
Strategic Sourcing Officer  
Division Of Purchases and Supply  
Commonwealth of Virginia  
1111 East Broad Street, 6th Floor  
Richmond, Va 23219

Dear Katherine,

Material and Contract Services, Inc. (MACS) is pleased to present a proposal reply to the Commonwealth of Virginia to provide Training For Procurement Professionals, RFP No. E194-1922. MACS has the resources, training experience, and it is an established and focused business enterprise to provide the services.

Our 'best in class' master instructors and trainers have extensive experience providing standard and customized training programs to many government agencies. Their highly rated programs and presentation styles will ensure the best training value will be available to the Commonwealth and affiliates of the master agreement. Our educators have a wealth of experience and current knowledge in procurement, contracts and supply chain. They will be one of the main contributors to our request to provide customize training programs to meet the needs of the Commonwealth and affiliates.

MACS has fully complied with the proposal request conditions and have no objections to the proposed master agreement's term and conditions. I am very confident our training programs will enhance and improve the procurement skills and knowledge of course attendees. MACS is a certified State of California small business entity and would like to be considered a small business member during your evaluation process.

Our proposal reply is valid until September 30, 2015.

I look forward to your review of our responsive proposal reply. I can be reached at 925-460-0397 if you have questions.

Best Regards,

A handwritten signature in blue ink that reads "Dan P. Plute". The signature is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Dan P. Plute  
CEO/President  
Material and Contract Services, Inc.

Pleasanton, CA  
Santa Ana, CA

5820 Stoneridge Mall Road, Suite 217  
250 Golden Circle Drive, Suite 205  
[www.macservices.us](http://www.macservices.us)

925-460-3971  
714-647-1520



DEPARTMENT OF  
GENERAL SERVICES

# COMMONWEALTH of VIRGINIA

DIVISION OF PURCHASES and SUPPLY

1111 EAST BROAD STREET, 6<sup>th</sup> FLOOR, RECEPTIONIST/BID RECEIVING, RICHMOND, VA 23219

## REQUEST FOR SEALED PROPOSAL (RFP) # E194-1922 TRAINING FOR PROCUREMENT PROFESSIONALS

NIGP Commodity Codes: 92416, 92435, and 92441

ISSUE DATE: May 29, 2015 • DUE DATE/TIME: July 16, 2015 – 1:00 P.M. EASTERN TIME

PROPOSALS RECEIVED AFTER THE DUE DATE AND TIME WILL NOT BE CONSIDERED

PROPOSALS WILL NOT BE ACCEPTED BY FAX OR EMAIL

DPS Statewide Strategic Sourcing Officer: Katherine Bosdell, CPPB, VCO

E-mail: [katherine.bosdell@dgs.virginia.gov](mailto:katherine.bosdell@dgs.virginia.gov)

**USING AGENCIES:** All Commonwealth of Virginia agencies, institutions of higher education, or other public bodies as defined in *Code of Virginia* §2.2-4301, to include private institutions of higher education chartered in Virginia as defined in *Code of Virginia* §2.2-1120, NASPO ValuePoint Participating Entities, and any other public bodies which may be added through amendment to any Agreement.

**PROPOSALS THAT DO NOT MEET THE QUALITY STANDARDS REQUIREMENTS IN SECTION I.B "PURPOSE" MAY NOT BE CONSIDERED.**

**TERM:** Two (2) year initial term with up to four (4) additional one-year renewal options.

**PRE-PROPOSAL CONFERENCE:** An Optional Pre-proposal Conference will be held at **2:00 P.M. on June 16, 2015**, at the Patrick VA Henry Building, 1111 East Broad Street, 6th Floor, Room 6031, Richmond, 23219. Potential Offerors who intend to submit a proposal to the RFP will be issued in an amendment which must be signed and included in the Offeror's proposal. Refer to Section VI for information.

**CLARIFICATION OF RFP:** It is the Offeror's sole responsibility to Bosdell, in writing, with questions about the specifications or other solicitation documents **no later than 3:00 PM on July 6, 2015**. to the solicitation will be made only by amendment; and 2) Obtain changes or cancellation) from the eVA website and Awards." Refer to Section XVII.B.6 for information.

**Verbal requests for information will not be accepted.** Any revisions all current information (i.e., amendments, notifications, e) <http://www.eva.virginia.gov> and clicking on "Solicitations, Quick Quotes

Contracts will be awarded to eVA registered vendors only. Refer to Attachment B Item 14 for registration information. Small, Women and Minority Owned (SWaM) Businesses must be certified by the Virginia Department of Small Business and Supplier Diversity and are encouraged to submit proposals in response to this solicitation. Obtain certification information at <http://www.sbsd.virginia.gov>.

**AWARD POSTING:** Upon the award or announcement of a notice to award a Contract as a result of this solicitation, the Commonwealth of Virginia through the Department of General Services, Division of Purchases and Supply, will publicly post such notice online at <http://www.eva.virginia.gov> for a minimum of ten (10) calendar days.

The undersigned hereby offers and agrees to furnish all goods and/or services in accordance with the attached signed proposal and the mandatory requirements outlined herein or as mutually agreed upon through subsequent negotiation.

Company Name: Material and Contract Services, Inc.

Email: [dplute@macservices.us](mailto:dplute@macservices.us)

Address: 5820 Stoneridge Mall, Rd, Suite 217

Telephone: 925-460-0397

City/State/ZIP: Pleasanton, CA 94588

Fax: 925-227-1669

Signature: *Dan P. Plute*

Cell: 925-360-8356

Printed Name: Dan P. Plute

eVA Vendor ID Number : *V50000154220*

Title: President

DSBSD Number (if applicable):

Date: July 27, 2015

Vendor SCC ID Number: *F200196-6*

This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, §2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

**RETURN OF THIS PAGE IS REQUIRED**



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REQUEST FOR SEALED PROPOSAL (RFP) # E194-1922 TRAINING FOR PROCUREMENT PROFESSIONALS

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### **RESUME BIOS**





# **Material and Contract Services, Inc. PROPOSAL REPLY**

COMMONWEALTH of VIRGINIA



## **EXECUTIVE SUMMARY**

**July 26, 2015**

## **1. EXECUTIVE SUMMARY**

Material and Contract Services, Inc.'s proposal reply is in response to the State of Virginia's proposal request number E194-1922; Title - Training for Procurement Professionals; Date of Issue: May 29, 2015.

### **1.1 Material and Contract Services, Inc. (MACS) Overview**

Material and Contract Services, Inc. is a State of California "C" corporation. The company's street address is 5820 Stoneridge Mall Road, Suite 217, Pleasanton, CA 94588. The company's mailing address is P. O. Box 12096, Pleasanton, CA 94588.

#### **Company's Authorized Personnel**

**Dan P. Plute**, President

Telephone Numbers: Office 925-460-0397; Cell 925-360-8356

Email: [dplute@macservices.us](mailto:dplute@macservices.us)

**Azita Ameli**, Vice President, Operations

Telephone Numbers: 925-460-0397; 460-3971; Email: [aameli@macservices.us](mailto:aameli@macservices.us)

**Nina Veselova**, Vice President

Telephone Numbers: 925-460-0397; Cell: 925-360-8357

Email: [nves@macservices.us](mailto:nves@macservices.us)

#### **Reporting and Payment Instructions**

Accounting Representative: Evelyn Beauchamp.

Telephone: 925-460-0397

Email: [accountantmac@macservices.us](mailto:accountantmac@macservices.us)

Invoices and payments can be submitted electronically.

#### **Reporting**

MACS will submit quarterly reports verifying compliance to the following performance measurements: attained stated learning objectives; relevant course materials ; appropriate time allotted to the learning activity, and effective individual training instructors . Our goal for all instructional programs is a success rate of seventy-five percent (75%) or higher. Reports will be prepared by Mr. Steve McCredie, reviewed and approved by our Master Trainers.

#### **Points of Contact**

Main Point of Contact: Dan P. Plute

Alternate Points of Contact:

Steve McCredie: Telephone: 916-425-8949, Email: [smccredie@macservices.us](mailto:smccredie@macservices.us);

Carol Lemke: Telephone: 925-460-03978, Email: [adminmacs@macservices.us](mailto:adminmacs@macservices.us);

## **1.2 Material and Contract Services Inc.'s Strengths, Capabilities and Experience**

Material and Contract Services, Inc. (MACS) has the technical and administrative resources, corporate skills, and experience to provide procurement training to the State of Virginia and affiliates. MACS is a successful small business entity with over 12 years of procurement, supply chain, contract management, project management, training as well as traffic and logistics support to private industry companies, government agencies and educational organizations. Mr. Plute has owned and managed procurement, supply chain, and training companies since 1989. Prior to MACS, he owned and managed Procurement Services Associates (PSA). MACS has the wherewithal, experience and resources to be responsive to the State of Virginia's training requirements, to manage the training contract, to assemble a very qualified team of Master Instructors, Trainers and support personnel. MACS is a viable entity that provides professional training services, consulting, and project support services on a statewide, multi-state or nationwide basis. MACS will ensure the training programs meet the objectives of the training requirements. We have multiple resources to provide the training courses and to create custom training programs. Our training personnel have conducted on-site and web-based training classes. Our training instructors have provided training classes to the State of Virginia. They have received "excellent and very good" ratings after their presentations.

MACS' experience includes successful completion of professional services and training contracts with LA Metro, BART, Genentech, Kaiser Permanente, The J. Paul Getty Center, Disney, UC Berkeley, Contra Costa Community College Sacramento State University and Lawrence Berkeley Laboratory among them.

MACS' training courses will be offered as individual courses that can stand alone, but also may be used as part of a program or curriculum of training leading to professional certification in all areas of procurement. Our course curriculum will include courses in business analysis, business skills development, leadership, and management. We will provide training services for public procurement professionals, consisting of training instruction, course customization, and course development. MACS will provide documents confirming that our training program classes will be accredited / certified by the associations and boards listed in item 1B, points 1 and 2 of the proposal, pages 3 and 4 of the RFP document.

MACS will be the best company to perform the training services for the Commonwealth and participating entities because:

- MACS' Master Instructors/Trainers have successfully performed training services for the Commonwealth, NIGP and many governmental agencies;
- MACS has the infrastructure and management team to manage and administer the training programs;
- MACS has multiple 'best in class' instructors, trainers and academic professionals;
- MACS has the capabilities to customize training courses;
- MACS and its training management team have been successful in all of the training classes and business endeavors;
- Many of our instructors have years of working experience as well as years of classroom experience.

MACS' management team has read and understands the terms and conditions of the Master Agreement. We understand and accept the fact that negotiating may be required to finalize the terms and conditions of a Master Services Agreement.



# **Material and Contract Services, Inc. PROPOSAL REPLY**

COMMONWEALTH of VIRGINIA



## **EXPERIENCE AND QUALIFICATIONS**

**July 26, 2015**



## **2.0 EXPERIENCE AND QUALIFICATIONS**

### **2.1 Experience**

Material and Contract Services, Inc. is a State of California “C” corporation. The company started in 2003 and became a corporation in January 2015. Dan P. Plute also organized and created Procurement Services Associates (PSA) in 1989 and combined the business practices in 2006. Our office hours are 8:00 am to 5:00 pm, Monday through Friday. The company’s web site is:

[www.macservices.us](http://www.macservices.us). MACS’ organization chart is included in the Exhibits section. MACS has the management team and resources to successfully manage and provide training services to the Commonwealth of Virginia and affiliates. The resources include a cloud-based activities tracking system MaxHire. The system records incoming job orders and requests for services, and tracks activities, scheduled event dates, etc. It also tracks incoming and outgoing email activities with a client. All activities and events for the Commonwealth of Virginia will be recorded in our system. Our resources to successfully manage the training program Master Service Agreement include:

- QuickBooks Accounting and Payroll system
- Paychex Agreement to process our payroll and tax payments
- Direct Deposit capabilities via Chase bank
- Employee Benefits – vacation, medical, dental and Fidelity Simple IRA program
- B to B capabilities for invoice receivables
- A management team that has successfully managed large and small projects
- A world-class training team that can meet and exceed the training goals and objectives
- Over 20 years of experience in Procurement, Supply Chain, Contracts Management, Traffic and Logistics, and Project Management

MACS’ experience included over 20 years of providing professional services to federal, state, municipal governments and private companies. MACS’ training team members have over 15 years of successful experience supporting supply chain, procurement, contracts, project management, and traffic and logistics. Messrs. Kolodisner and Ghamami, as Master Instructors, and all our trainers are experienced at providing classroom and web-based training to government agencies. Mr. Kolodisner is active in CAPPO and NIGP. He has provided training programs to NIGP members. His recent experience includes a procurement training program for the City of Palo Alto. Mr. Ghamami has prepared and presented successful classroom training for the Commonwealth of Virginia in the past. Mr. Steve McCredie, MACS’ Program Manager, has managed and directed classroom and web-based training projects for ISM’s Sacramento Valley Chapter. Mr. Plute was an Executive Advisory Member of NCMA for over six (6) year. He resigned in 2013. He is currently an Advisor and Delegate for San Jose State University’s Industrial Engineering Department. Many of our training group members and MACS’ management team are current and active members of Procurement and Contracts Management associations. We understand the always changing business processes, management techniques and management philosophies of the procurement, contracts and materials management world. Keeping abreast of the trends and best practices programs are embedded in the training mode of our master instructors and trainers.

## **2.2 MACS' Mission Statement**

MACS' owner and its management team's employment and client services policies and procedures emphasize honesty, fairness to employees and clients and understanding the unique needs and requirements of its employees and clients. As a professional procurement organization, we encourage our specialists to review the honesty and non-collision policies of ISM, NCMA, NIGP, CAPPO, among others, and apply them to our clients and our company. Our company's goals and objectives are socially-conscious, and we strive to provide the highest quality standards and endeavors to our work practices and programs. The company maintains the current knowledge of new and 'best practices' programs and to deliver results that meet or exceed the expectations of our clients.

MACS' educational/training services are devoted to delivering the highest level of training solutions to private and public sector purchasing professionals, enabling purchasing departments and their employees to achieve world class best-value processes and results. Our results, oriented to traditional and web-based training systems, are designed to be an effective tool in imparting key learning points and are constantly reviewed and improved to ensure that the latest and best practices are being employed in the profession. The training is designed to be constantly reviewed and improved to present the latest and best practices programs being employed in the profession.

Our training mission is to impart knowledge which will improve the efficiency and effectiveness of public agencies' and private industry companies' procurement, supply chain and contracting programs. Our training programs are centered on enhancing and improving the skill levels and knowledge of procurement professionals. Our trainers have hands-on and management experience in the professions they teach. They recognize the growth phases moving from entry level to senior management. They use this knowledge base to be effective in conducting the training classes. Our training program modules are designed to provide training and information which will improve the skills and ability of our students to effectively perform their duties as public sector professionals.

Our business practices and programs are structured to intertwine with procurement, supply chain, contracts, project management, and traffic and logistics professionals and associations. We structure our professional services and training programs to be current with existing and "best in class" concepts. MACS' company policies and procedures are geared to customer satisfaction and responding to concerns and issues of our clients.

MACS' and our training instructor's goals are to:

- Respect and value our students
- Provide instructors who are professionals in their fields of expertise and engaged in life-long learning in their disciplines
- Ensure students benefit from training and are able to practically apply it
- Impart the most up-to-date and relevant training available
- Ensure that each student is given the attention to meet his/her educational requirements
- Allow and encourage students' participation in each class in order to enhance classroom learning
- Be available after the conclusion of the course to assist students with learning issues

### 2.3 Relevant Experience and Similar Work – Private and Public Entities

Material and Contract Services and affiliated companies have over 20 years of successful experience providing consulting, staff augmentation, training, and procurement services to public agencies and private industry clients. Our services have been provided to many of the US states, Canada and to global clients. Mr. Ghamami recently completed a training program for a client in Turkey.

Our public agency support services began with Bay Area Transit District (BART) in 1991, and it continues today with many large government agencies, including cities, counties and state government entities. The company's goal is to excel in our endeavors to provide the best available services in procurement, contracts, materials management, traffic and logistics, and training. We are able to achieve our goals because we employ only professionals that have succeeded in their career endeavors as procurement, supply chain, and contracts professionals.

MACS' standardized core courses training modules have been custom build over time and the course contents developed based on the training program author's skills, knowledge and experience. The modules have been updated based on training program attendee comments and suggestions. MACS' master instructors and trainers understand procurement, contracts, and they have the capability to discuss the goals and objectives of the States procurement training programs and to customize the courses to fit the specific needs of the attendees as well as the agencies' goals and objectives. The course contents have been updated to reflect current trends and metrics of the major professional services organizations, such as ISM, NCMA, APICS, etc.

Material and Contract Services, Inc. has provided consulting, outsource procurement and training services to the following public agencies:

- Contra Costa Community College District
- Bay Area Rapid Transit District (Bart)
- Orange County Sanitary District
- City of Lakewood
- City of Oakland
- City of Pittsburg
- City of Redondo Beach
- City of Stockton
- City of Berkeley
- City of Concord
- City of Irvine
- City of Santa Ana
- City and County of San Francisco
- Contra Costa County
- Contra Costa Sanitary District
- County of Los Angeles
- Los Angeles Metropolitan Transit District
- Metropolitan Water District
- University of California Berkeley
- University California – San Francisco
- University of California – Davis
- Contra Costa Community College District
- UCLA Medical Center
- Alameda County
- Alameda County Transit District, etc.

### **Training Experience**

- State of Wisconsin
- City of New York
- State of New Jersey
- Washington DC area council of governments
- Metropolitan Water District of Southern California
- Orange County Fire Authority
- Arlington,
- VA County government
- City of Glendale, AZ
- State of New Mexico
- City of Palo Alto
- Harvard University
- Foxconn
- British Petroleum
- Teledyne Electronics
- Toyota Motors
- Shell Oil
- Pacific Gas & Electric
- California Community College District
- Achilles
- Onyx
- MD Anderson Center
- NIGP
- Raven Gardens
- Merichem Company
- Devon
- Nov Wilson
- Greene Tweed
- Show Dynamics
- D.R. Metals
- State of Vermont Department of Buildings & General Services
- University of Houston
- ACN
- Biznet Solutions
- Riverway Business Services
- Occidental Oil and Gas Corporation
- Intuitivum Group
- Plus Alpha Risk Management Solutions
- Petroleum Accessories, Inc.
- Missouri City, Texas Purchasing Department
- Men's Warehouse
- CAPPO
- NPI
- NASPO.

No discounts were provided to the clients.

### **Client Retention Rate**

Material and Contract Services has provided services to over 100 clients during the past 20 years. Many of the clients, approximately over 60 percent of our long term clients, are retained. For instance, we started collaboration with BART in early 1990's and we still are a valid service provider to them. , we began our business association with Los Angeles Metropolitan Transit District in mid 1990's and we continue to provide services to them today. We have provided professional services to Genentech since the early 2000's, and we continue working with them in 2015.

We are very responsive to our client's needs, expectations, and program deliverable requirements. Our professionals understand the business pressures and company goals and objective; they have been in the business arena. The company's mission is to provide a high level of customer support and to be responsive to a customer's concerns while meeting MACS' agreement terms and conditions. Most of our clients rate us above average in customer responsiveness.



### **MACS' Growth**

Material and Contract Services, Inc.'s growth rate has been stable for the past 5 years. Our total revenue has ranged between \$2.3 and \$3.7 million since 2010. We have maintained the company's structure for over 5 years, consisting of two major office and one home office locations in California. Our managers and training team members have been affiliated with MACS for over 5 years.

### **Geographical limits**

We can provide training, consulting and outsource procurement services to all domestic states and to many international locations. We can provide services to all participating states listed in the RFP document, and we have the capabilities and capacity to provide the services to other state locations when they team with the State of Virginia for the services.

### **Responding to Customer Complaints**

MACS will respond to customer complaints and services issues within one (1) business day after receipt. Our process includes direct contact with the State Project Manager/Coordinator via email, text or telephone. Our Program Manager, Master Instructor or Mr. Plute will discuss the concerns and issues with the State Program Manager or Project Lead, identify the problem and discuss corrective measures. MACS' process includes discussing the issue with the trainer or person at fault, reviewing the program policies and procedures, and making corrections. If the problem is a trainer presentation issue, one of the Master Instructors will discuss the problem and advise the trainer of the need to improve. We will advise the State's person-in-charge of our corrections. The problem issue and corrective action will be noted in MaxHire, our cloud-based software.

### **Customer Satisfaction Evaluation Method**

Our training programs include a students' program evaluation form (refer to the exhibits section for a copy of the document). Information elements on the document ask for the attendees' evaluation of the course content, instructor presentation style and other factors that help us assess the effectiveness of the presenter/trainer. We have incorporated many of the evaluation elements found on professional association documents. We will discuss our evaluation documents with training program managers before the start of the training program. We will adjust the document when required. In addition to the students' evaluation document, we contact the State's point-of-contact and discuss the training program and feedback from the students. For our web-based training we will submit the program evaluation document at the end of the training program session. Our trainers will also contact the attendees via phone or email to request an evaluation of the course.

We will assess negative evaluation factors and make corrections to the program's contents or instructors' presentation methods.

### **Managing Multiple Participating State Accounts and Multiple Accounts Within a State**

MACS has successfully managed project /contract awards from multiple divisions within a corporation and for a government agency with multiple departments. We distinguish each award within MaxHire, our cloud-based project-monitoring software. Our accounting department also creates separate records for accounting and invoice processing. Our Program Manager, Mr. Steve McCredie will direct

each award as a separate entity, and he will coordinate invoice processing and invoice payments with MACS' accounting coordinator. A copy of the contact/master services agreement will be maintained in a contract award file. Our working knowledge of managing multiple location transactions will not be a problem.

### **Invoicing Process And Accepted Methods**

Evelyn Beauchamp, our accounting manager, will coordinate and manage all State of Virginia and affiliated states accounting services. She will record invoice mailing and invoice submittal information into our QuickBooks accounting system, and use the system information to create invoices. Our Program Manager or the Vice President of Operations will review the invoice before it is submitted. We can provide/send a draft copy of the invoice to the agency requesting the training for approval if required.

Our normal invoice payment process includes:

- Direct Deposit – B2B programs
- Fax
- Email
- Mail via P.O. Box

We do not accept credit card payments, but will consider this method as an alternative to our normal process.

### **Employment**

Material and Contract Services, Inc. has two offices and one home office locations. The office locations are Pleasanton and Santa Ana, California. The home office is located in Sacramento, CA. Our total employee level as of June 30, 2015 was 43. The Pleasanton office, our corporation headquarters, has 30 employees; the Santa Ana office has 13 employees. Both office locations have presided in the same office buildings for approximately 10 years.

Our master instructors and trainers have expressed an interest to become a MACS' instructor or trainer upon project award. We will have a Letter of Understanding signed by each trainer upon contract award. Mr. Plute has direct links with the college professors/educators presented in the proposal reply. They have committed to be available as required. The Master Instructors, Mike Kolodisner and Omid Ghamami, have prior employment history with MACS.

### **Criminal Background Check Procedure**

Material and Contract Services, Inc. uses the services of Verified Credentials for criminal and background checks. Our agreement age is approximately five years. Verified is very responsive and thorough in processing our background and criminal checks. They have performed the services in multiple U.S. states. The process includes educational, criminal, and background checks. We will structure the background checks to meet the State of Virginia and affiliated states requirements.

We will ensure that all our training professionals have completed a criminal and background check within the past 90 days before they are assigned to manage or present a training class. We will maintain a record of the background and criminal check documents.

### **Litigation**

Material and Contract Services, Inc. has no pending legal proceedings or business litigation against the company, any officer, or principal.

### **Debarment**

Material and Contract Services, Inc. nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this procurement by any government department or agency.

### **Technology and Data Security**

Material and Contract Services, Inc. has its own data and email servers. Our security technology includes:

- Sonic Wall/Firewall technology to protect against intrusion
- Symantec Mail Security for Microsoft Exchange
- Symantec End Point Anti-Virus software

Our internal security is protected with locked client and payroll files. The files are stored in a secured and locked office.

### **Receiving Contract Orders – Receiving Assessment Reports**

We can receive training program orders via email, telephone, fax, USPS, or special delivery services. We are presently modifying/improving our web site and will have the capability of receiving orders via the web site by September 1, 2015. Our process is to confirm receipt of a training order within four (4) business hours and to verify training program elements within one (1) business day. Personnel experienced in procurement and training programs will be dedicated to the State of Virginia Master Services Agreement.

Assessment reports will be received by our Training Program Manager, or his alternative via a secured email server. The Manager will review the assessment reports with our Master Instructors and the program presenter. Based on the review's negative points, we will assess the presenter's methods and the course contents. We may adjust the training course elements.



# **Material and Contract Services, Inc. PROPOSAL REPLY**

COMMONWEALTH of VIRGINIA



## **METHODOLOGY**

**July 26, 2015**



### **3.0 METHODOLOGY – SPECIFIC APPROACH FOR PROVIDING SERVICES**

#### **3.1 Approaches to Providing Training Services**

Material and Contract Services, Inc. has the resources, company expertise, and experience to provide training services in procurement, project management, supply chain management, supplier management, legal aspects of procurement, and business competencies. The high number of return clients and repeat customers in the training area demonstrate that we will be successful in providing the excellent level of training. We will satisfy or exceed the training program deliverables to the State of Virginia and affiliates. MACS' strengths in providing the successful training services include:

- A large number of standardized core courses
- The number of years the instructors/trainers have provided training services to a large number of public entities
- The high ratings and favorable comments the Instructors have received from training participants
- A large number of training professionals available to present the on-line and class room training
- The capability and knowledge to modify standardized core courses to meet specific needs of clients
- A capable and knowledgeable internal staff to manage the contract award and any unique client requirements
- A strong commitment to customer satisfaction in all our endeavors.

The contract award from the State of Virginia would not be a new endeavor for MACS. Our company has many successful years of experience managing large volume and high dollar contracts. It has experienced the 'extra effort requirements' to start a new business endeavor; it has successfully sought a 'work around' when simple problems create issues in a process flow or schedule event. Our management team, master instructors and trainers understand the company's success factor and their career endeavors are directly linked to client / customer satisfaction.

MACS' commitment to provide the best available training services is demonstrated by the expertise of our Master Instructors, the availability of college educators and trainers to perform the learning experience and to create new or modify existing training programs/courses. The college professors has direct experience teaching classes within the areas of training, pertinent to the State of Virginia; most have demonstrated their supply chain and procurement knowledge in published articles. MACS' standardized core courses and customized training programs will provide public procurement organizations with high value learning and development, while also providing significant time and cost savings.

MACS is a private company and we have a dedicated staff of knowledgeable procurement, contracts, project management and supply chain professionals to successfully execute the contracts deliverables of providing the training services. Our staff includes:

- Program Manager – Steve McCredie
- Alternate Program Manager – Brian Peters
- Master Instructors/Trainers – Omid Ghamami, Mike Kolodisner and Chuck Noland
- Successful Business Owner and Entrepreneur - Dan P. Plute
- Educators – Yasser Dessouky, Zinovy Radovilsky and Richard Dawe
- Accounting Manager – Evelyn Beauchamp
- Administrator – Carol Lemke

Steve is the President of ISM's Sacramento Valley Chapter. Steve has managed and coordinated many training programs for the chapter. His efforts included coordinating the training programs with the students/association members, managing the course handout materials, reviewing the instructor evaluation materials, discussing the evaluation documents with the instructor and preparing and presenting course certification documents. Steve will be assisted by Omid, Mike and Chuck, when required.

Mr. Ghamami has 21 years of training experience in 19 countries. The training programs have been provided to Fortune 500 companies, to small and mid-size organizations, and to public agencies. His public experience includes training programs for the State of Virginia. Omid has approximately 5,000 training course hours.

Mr. Kolodisner has been in training services since 1985. He has taught hundreds of classes and at least 25 difference courses. Mike's training experience includes a minimum of 100 public agencies like the US Federal Government and government agencies in Canada; as well as private clients, such as IBM, Motorola, Sprint, Boeing, Telus (the Canadian phone company), and Tucson Electric Power.

MACS' educators have relative experience in teaching procurement, supply chain, materials management and project management to State of California Colleges. Yasser Dessouky is the Department Chair for San Jose State University's Industrial Engineering Department; Zinovy Radovilsky is the Department Chair for the School of Business at California State University, East Bay; Richard Dawe is the Department Chair for Procurement at Golden Gate University.

All courses will have the capability of being provided synchronously (i.e., in real time) via video teleconferencing technology. This methodology is best suited for courses/seminars that are four (4) hours or less in length per day. Courses and seminars longer will be conducted via teleconferencing, but there would need to be agreement between both parties of the benefits and limitations of this approach. No travel fees will be imposed with this model and each party will need to provide their own video teleconferencing equipment to support such

services. MACS will provide the technology platform that is used to host the web-based training for both parties to use.

Asynchronous web-based training models (i.e., on demand) can also be supported. In such case, a professionally recorded and edited audio presentation in MP4 format would be created that can either be downloaded and watched on demand and/or can be accessed through the internet for on-demand viewing. Trainees would hear the instructor's voice and see the materials and be able to pause and play at will. Any such asynchronous web-based training course development requests will be viewed as a custom training request. Further arrangements may be made to have the instructor who developed and taught the asynchronous web-based training course hold a live teleconference with trainees, helping them to understand and apply concepts learned, and to answer any questions they had from having taken the training. An example of this type of asynchronous web-based training

course, which has been developed by one of our Master Instructors, can be presented upon request.

### **3.2 Managing the Contract Award**

MACS has the resources, employees, and training talents to successfully perform the scope of work and to provide exceptional delivery level. We have the resources in place to manage the account, from the initial point of contact to submitting training requirements, to Master Instructors to effectively identifying the training objectives, through the best training method, i.e. web- based, self-taught, or classroom instructions.

MACS has assigned the Program Manager, Mr. Steve McCredie, to the project. He will communicate with the client to assess critical learning objectives for the seminar. This information will be shared with our instructors prior to booking the seminar, so that the instructors can address those specific needs while preparing their presentation. Steve will ensure the MACS' Instructor has all classroom materials, and he will coordinate with the client's representative to ensure that the meeting room is set up properly, and coordinate with food service staff, etc. Steve will also coordinate and send CEH achievement awards to the class. (sample included). Upon completion of the seminar, the on-site coordinator will provide a one page report that will include the summary of items covered during the seminar. MACS' Instruction Coordinator will debrief both the on-site coordinator and the instructor regarding how well the learning objectives were met as well as any other concerns. The Program Manager will return by mail the registration sign-in sheet and customer satisfaction surveys. Upon receipt, MACS' Instruction Coordinator will compile the survey results in an Excel spreadsheet. Any marks that are noted less than "good" or "agree" will be addressed with either the on-site coordinator or the instructor. The information from each seminar will be combined with all other seminars during the quarter and included in the quarterly report. The quarterly information will be presented with a chart to show any trends.

Our Master Instructors and college educators are qualified and available to work with participating entities in customizing courses. In addition, they also have experience and the ability to provide related services, such as consulting, program implementation oversight, and student tutoring. Master Instructors and our trainers will make themselves available to the Client Agencies before training sessions to ensure that our client's specific learning objectives are understood. Before the training session starts, they will modify training materials and examples to meet the needs of the Client Agency. After the training program, they will meet with students and the client's program manager to answer clarifying questions and assist with any implementation issues or needs the Client Agency may have.

Our Master Instructors will meet with the entity's representatives to discuss and examine the professional development needs of students. Once these needs have been determined, the instructors will offer what they consider the best alternatives to meet those needs. Among those will be either development of entirely new programs specifically designed for the entity or customization of existing programs. In addition, they will discuss and suggest the best format for presentation and effectiveness of those programs such as webinar, or face-to-face instruction.

MACS will dedicate responsible employees and managers to handle all aspects of the training award, from program requirement definition to planning, scheduling, and evaluating the training program. The main processes to a successful training road are:

- Receiving the training request for proposal – Program Manager
- Identifying the training program goals/objectives – Master Instructors and Training Requestor
- Identifying the student base and skill levels of the program participants – Master Instructor and internal program coordinator/manager
- Determining if off-the-shelf programs will fit the training need – Master Instructor
- Managing and coordinating the training program events – students' hand-out materials, students' evaluations, classroom selection and confirmation, and program break activities, etc. – Program Manager
- Determining the type of web-based program for the students – Master Instructor
  - a. Instructor managed/directed
  - b. Student – self-pace directed
- Evaluating Program effectiveness – trainer/instructor/student
- Discussing training program success with client representative –Master Instructor
- Discussing training program success with MACS' trainer – Master Instructor
- Determining if training program instruction techniques need to be updated – Master Instructor and Program Manager
- Determining if the hand-out and presentation methods/displays need to be improved - Master Instructors/Program Manager
- State's Training Program Reports – Master Instructor, Program Manager and Project Manager



MACS has simple, flexible and responsive ordering options. We will respond to program order requests within one business day.

### **3.3 Expertise And Capability To Custom Design Training Courses**

MACS has the resources and expertise to align training services to meet the needs of a client by customizing current courses or by re-arranging existing modules to set up a unique curriculum. Our capabilities also include developing custom programs to meet a course objective or the learning needs of the students. The master instructor and educators in MACS's staff and management team will perform the work to re-align courses or re-arrange existing modules.

### **3.4 Course List**

The exhibit section of our proposal reply contains a list of courses by course title and linked to the four training modules listed in the RFP document. They are also segregated into the following categories:

- Procurement
- Project Management
- Business Skills

### **3.5 Course Content**

MACS' training modules and customized courses will relate to the optimization of knowledge and competencies in the follow categories:

- Universal Public Procurement Certification Council UPPCC Body of Knowledge
- Project Management Institute Body of Knowledge PMBOK
- Supply Chain Management
- Supplier Management
- Legal Aspects of Procurement
- Business Competencies

### **3.6 Learner Assessment**

One of the primary means of assessing the effectiveness of the course and the learners' experience is the student evaluation document (refer to the exhibit section for an example). The assessment document is a very complete evaluation of the course contents, the instructors' presentation methods, and meeting the objectives of the client. MACS' document has been used for many years, and it has been refined, so we can gauge the effectiveness of our program.

At the time of booking a new seminar, MACS will clearly spell out the learning objectives related to the seminar during telephone conversations with both the Client and the Instructor. MACS uses a Customer Satisfaction Survey that is filled out by attendees to assess individual responses at the end of the training event. Upon completion of the seminar, a Client on-site coordinator will provide a one page report that will summarize items covered during the seminar. MACS will debrief both the Client and the Instructor regarding the quality of the presentation as well as any other concerns. This telephone debrief will specifically cover how well the learning objectives were met. The information from customer satisfaction surveys will also be discussed during the debrief.



# **Material and Contract Services, Inc. PROPOSAL REPLY**

COMMONWEALTH of VIRGINIA



## **ADDITIONAL INFORMATION**

**July 26, 2015**

#### **4.0 ADDITIONAL INFORMATION**

MACS has the capability and professional resources to provide additional services that could benefit the participants in the Training Program Master Services Agreement.

The following are available:

**Professional Coaching** can be given to individual contributors and first-line managers on a one-on-one basis in procurement functions to help them with job effectiveness and personal coaching strategies to better recognize, pursue, capture, and measure opportunities to improve personal and departmental processes and results. Focus areas examples include procurement skills development, priority management skills, purchasing project management, negotiation training, objective setting and tracking methodologies, personal goals management, and best value assessment training. This coaching can be done face-to-face, by phone, or using video teleconferencing technology.

**Executive Coaching** can be arranged for mid- to senior level procurement managers to help them become more effective leaders and to recognize and drive strategies to generate better organizational results. Focus areas examples include systems, processes, organizational structure, management and leadership style, staff training, stakeholder/partner management, influencing management and bid committees, and strategy and objective setting methodologies and practices. This coaching can be done face-to-face, by phone, or using video teleconferencing technology.

**Consulting Services are available from MACS in the following fields:**

- Spend analytics
- Best value opportunity assessments
- Spends under contract
- Commodity strategies
- Aggregation strategies
- Piggybacking opportunities
- Departmental risk and compliance assessments
- Strategic Sourcing
- Low Value Procurements
- Vendor Managed Services
- Supplier Metrics
- Policy and Procedure Manuals
- Managing Contracts
- Preparing Scope of Work and Contract Deliverable Statements
- Managing Bid Protests
- Offshore procurements
- Total Cost of Ownership Analysis
- Benchmarking and Research Services, etc.
- Outsourcing and Make vs. Buy Analysis

#### **Interim Management**

Material and Contract Services, Inc. provides an executive level procurement, contracts, project manager, or materials manager professional to manage and direct the department

employees and programs. The person can assist with the selection of a new manager level person. We have very strong capabilities in the public agency area.

### **Cost Saving Programs**

- **Dollar Value Discount**  
MACS will provide a five (5) percent discount over our per hour rate when the dollar value of the contract spend exceeds \$300,000 in a 12 month period or contract year. The five percent savings factor above \$300,000 will start again on the second (2) year.
- **Invoice Payment Discount**  
Our invoice payment terms are 1%, 20, net 30. A discount of 1 percent will apply if the invoice payment is received within 20 days of the invoice date.

### **NOTES:**

- MACS will provide information on price adjustments to its discounted catalogue prices 30 days before the 365 day of the contract.
- All per student rates are based on a minimum of 20 students, if fewer than 20 students enroll in a course, individual student rate will be prorated based on the minimum of 20 students



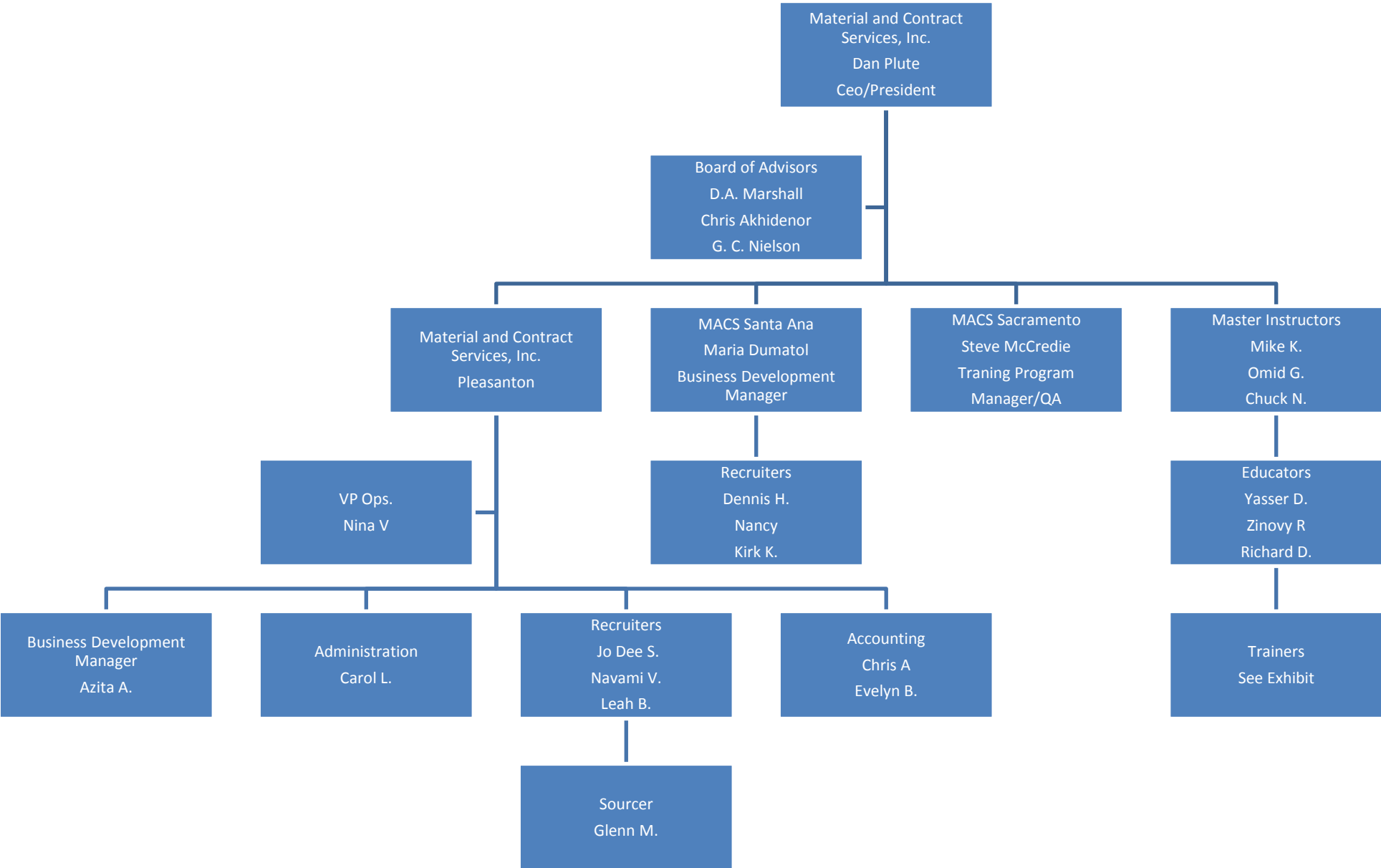
# **Material and Contract Services, Inc. PROPOSAL REPLY**

COMMONWEALTH of VIRGINIA



## **EXHIBITS**

**July 26, 2015**





Instructor	Title	Number of Courses	Topics covered	Platforms
<b>Michael Bohon, CPSM, CMRP</b>	Principal, Healthcare Solutions Bureau	5	a3, c3	Both
<b>Julie Brignac</b>	Principal, Vantage Partners	8	a1, a2, a3, c3, d5	Classroom
<b>Martin Carrara</b>	Senior Corporate Counsel - Pfizer/Wyeth	4	e1, e3	Classroom
<b>Richard Dawe</b>	Director of Operations & Supply Chain Management Program, Golden Gate University	(Coming Fall 2015)		
<b>Tom DePaoli, PhD</b>	Dept. Head, School of Management, Marian University	6	a1, a2, a3, c, Lean	Classroom
<b>Yasser Dessouky</b>	Chair, Department of Industrial and Systems Engineering, San Jose State University	6	f3, f6, Lean	Classroom
<b>Ron Emery</b>	VP Alchemy Associates	21	a1, b9, c2, d5, e1, e2, e5, f3, f5, f6, f9	Classroom
<b>Eldonna Fernandez</b>	Principal, Think Like a Negotiator	4	a4, a5, f17	Both
<b>Henry Garcia</b>	President, Asentrene, Inc.	64	a1, a4, a5, a6, b1, b2, b3, b4, b5, b6, b7, b8, b9, b10, d2, e1, e3, e5, e7, f3, f6, f17, CPSM	Classroom
<b>Marilyn Gettinger</b>	Principal, New Directions Consulting Group	46	a1, a2, a3, a4, a5, a6, a7, b1, b9, c1, c2, c3, c7, d2, d4, d6, e1, e3, e7, f3, f5, f6, f11, f14, f15, Lean	Both
<b>Omid Ghamami</b>	President, Purchasing Advantage	29	a1, a2, a4, a5, a7, c6, c7, d2, d4, e1, e5, e8, f2, f3, f4, f13	Both
<b>LeRoy Graw</b>	President, International Purchasing & Supply Chain Management Institute	15	a1, a5, a7, b9, c2, d6, e4, e8, f3, Lean	Classroom
<b>Mark Grieco</b>	JD, Senior Partner, Grieco & Scalera	10	a4, b9, e2, e3, e4, e5	Classroom
<b>Jim Haining</b>	Senior Purchasing Analyst, Clark County, Nevada	3	e3, e5, f3	Classroom
<b>Ken Jones</b>	Director, Western Michigan University - Center for Integrated Supply Management	8	CPSM, a1, a4, b9, c4, c6, e1, f3	Classroom
<b>Mike Kolodisner</b>	President, Pro-Train	11	a1, a5, e1, e3, e4, f1, f4, f7, f8	Classroom
<b>Andrew Kwok</b>	Manager, Strategic Sourcing - Eaton Corporation	3	CPSM	Classroom

Topics Legend	
Topic (from RFP IX C,3)	Topic Code
<b>UPPCC</b>	<b>a</b>
Procurement Admin	a1
Sourcing	a2
Negotiations Basic	a3
Negotiations Adv.	a4
Contract Admin	a5
Supply Management	a6
Strategic Procurement Planning/Sourcing	a7
<b>Project Management</b>	<b>b</b>
Framework	b1
Integration Management	b2
Scope Management	b3
Time Management	b4
Cost Management	b5
Quality Management	b6
HR Management	b7



Tim Leh	Director of Strategic Sourcing - The Hershey Company	19	a2, a3, a4, b9, d7, e1, e8, f1, f3, f6, CPSM	Classroom
Elizabeth Lions	President, Elizabeth Lions Consulting	7	F6, F11, F16, F17, F18	Both
Patrick Lynch	ChainLEANK Global Sourcing	9	b9, CPIM	Classroom
Irene Marnell	Board Member - ISM Risk Management Sub Group	3	a5, f6, CPSM	Classroom
Michael Matalone	President, Excelsior, Inc. & XP3 Talent System	2	f5	Classroom
Darrin Matthews	Director, Portland State University, Contracting & Procurement	9	A1, A5, A6, C1, D6	Both
Zai Phiroz	Professor, Supply Management, Harvard School of Business	8	a6, a7, d1	Both
Greg Pustelnik		3	a5	Classroom
Zinoviy Radovitsky	Chair Department of Management, Ca. State University, East Bay	(Coming Fall 2015)		
Edie Raether	Change Strategist: Speaker Author Coach	17	A4, F4, F5, F6, F8, F15, F16	Classroom
Tammy Rimes	Principal, Tammy Rimes Consulting	1	a1	Classroom
Suzanne Sellers	Principal	7	a1, a5, d6, CPSD, CPSM	Classroom
Joe Shedlawski	Director, Supply Chain - Corepharma, APICS Master Instructor	14	a1, a6, a7, b1, c1, c3, f6, f16	Both
Paula Shoup	Owner/Executive Coach, Internal GPS	1	a3	Classroom
Gurpreet Singh	Strategic Supply Chain & Six Sigma Consulting LLC	10	a1, a4, a5, a7, c6, d7, Lean	Classroom
Barbara Teicher	Owner, Etc - Executive Training & Coaching	7	F8, F10, F15, F16	Both
Jim Ullum	Managing Partner, Source International	6	a6, c4, e6, f3	Classroom
Mark Weis	JD	11	a6, e1, e2, e3, e4, e5, e6	Classroom
Matt Werder	Chief Technology Officer, Senior Director - Enterprise Technology Solutions	3	a1, f16, Lean	Both
Patrick Woods	President, Supply Chain Education	19	a1, a4, a6, a7, b9, c2, c3, d2, d6, d7, e2, e6, f3, CPIM, CPSM, Lean	Classroom

Communications Management	b8
Risk Management	b9
Procurement Management	b10
<b>Supply Management</b>	<b>c</b>
Logistics	c1
Warehousing	c2
Distribution/Inventory	c3
Strategic Sourcing	c4
Training/Development	c5
Category Management	c6
Stakeholder Management, Advocacy, Marketing	c7
<b>Supplier Management</b>	<b>d</b>
Supply Market Analysis	d1
Supplier Qualification	d2
Supplier Development	d3
Supply Base Management	d4
Vendor Managed Inventory	d5
Socio-Economic Factors	d6
Supplier Relationship Management	d7
<b>Legal Aspects</b>	<b>e</b>
Practical Applications	e1
Contract Types	e2
Contract Development	e3
Provisions, Terms & Conditions	e4
Requirements & Specification Development	e5

Contract Disputes & ADR	e6
Model Procurement Code	e7
Legal Aspects of eProcurement	e8
FOIA	e9
<b>Business Competencies</b>	<b>f</b>
Economics	f1
Budgeting	f2
Accounting & Finance Skills	f3
Change Management	f4
HR Skills	f5
Management Theory	f6
Decision Making	f7
Critical & Creative Thinking	f8
Org. Behavior	f9
Group Dynamics	f10
Business Ethics	f11
Business Law	f12
Public Admin.	f13
Presentation Skills	f14
Business Communications	f15
Adult Learning	f16
Coaching & Team Building	f17
Strategic Thinking & Leadership	f18

## NASPO Value Point Seminar Key

Training Category	Sub-Category & Number
<b>A. UPPCC Body of Knowledge</b>	A.1 Procurement Administration
	A.2 Sourcing
	A.3 Negotiations
	A.4 Contract Administration
	A.5 Supply Management
	A.6 Strategic Procurement Planning and Sourcing
<b>B. Project Management Body of Knowledge</b>	B.1 Project Management Framework
	B.2 Project Integration Management
	B.3 Project Scope Management
	B.4 Project Time Management
	B.5 Project Cost Management
	B.6 Project Quality Management
	B.7 Project Human Resource Management
	B.8 Project Communications Management
	B.9 Project Risk Management
	B.10 Project Procurement Management
<b>C. Supply Chain Management</b>	C.1 Logistics
	C.2 Warehousing

	C.3 Distribution & Inventory Management & Controls
	C.4 Strategic Sourcing
	C.5 Training & Development
	C.6 Category Management
	C.7 Stakeholder Management Advocacy/Marketing/Outreach
<b>D. Supplier Management</b>	D.1 Supply Market Analysis
	D.2 Supplier Qualification & Performance Metrics/Oversight & Balanced Scorecards
	D.3 Supplier & Valued Partner Development
	D.4 Supply Base Management
	D.5 Vendor Managed Inventories
	D.6 Socio-Economic Factors in Procurement
	D.7 Supplier Relationship Management
<b>E. Legal Aspects of Procurement</b>	E.1 Practical Applications
	E.2 Contract Types
	E.3 Contract Development & Drafting
	E.4 Provisions & Terms/Conditions
	E.5 Requirement & Specifications Development
	E.6 Contract Disputes & Alternative Dispute Resolution
	E.7 Model Procurement Code
	E.8 Legal Aspect of e-Procurement

	E.9 Freedom of Information Act (FOIA)
<b>F. Business Competencies</b>	F.1 Economics, Budgeting, Accounting & Financial Skills & Reports for Procurement
	F.2 Change Management
	F.3 Human Resource Skills
	F.4 Management Theories
	F.5 Decision-Making
	F.6 Critical, Creative and Complete Thinking
	F.7 Organizational Behavior
	F.8 Business Ethics
	F.9 Business Law
	F.10 Public Administration
	F.11 Presentation Skills
	F.12 Business Communications
	F.13 Adult Learning
	F.14 Coaching & Team Building
	F.15 Strategic Thinking & Leadership
<b>CPSM/CPIM</b>	CPSM/CPIM Exam Preparation Courses
<b>IT</b>	Information Technology
<b>Lean</b>	Lean Six Sigma

## SEMINARS



Instructor/Seminar	Subject Categories (See seminar keys)	Learning Objectives	Face to Face Live?	Time	Web Live or Pre-Recorded?
<b>Michael Bohon, CPSM, CMRP</b>	<b>Principal, Healthcare Solutions Bureau</b>				
<b>Building and Honing Your Negotiation Skills</b> 1. The 3 major keys to success in every negotiation. 2. Tips, tools and tactics for better negotiation results. 3. Your behavior's effect on negotiation.	A.3		Yes	1, 2 or 3 days	
<b>Fundamental Principles of Effective Inventory Management</b> 1. Understand the financial implications of inventory to your organization's success. 2. Learn tools to be utilized to best manage inventory accuracy and eliminate waste. 3. Discover key elements of dealing with excess and obsolete materials in your inventories. 4. Review the process of the selection and implementation of inventory management software.	C.3, D.5		Yes	One day	
<b>Building and Honing Your Negotiation Skills - (5 - One Hour Sessions)</b> 1. The 3 major keys to success in every negotiation. 2. Tips, tools and tactics for better negotiation results. 3. Your behavior's effect on negotiation outcomes. 4. The first and most important step in the negotiation process. 5. Dealing with difficult negotiation and unique circumstances.	A.3		No	5, 1-hour sessions	Pre-Recorded
<b>Negotiating and Managing Strategic Business Relationships (1 – One hour session)</b> 1. Learn the six key elements of a successful SBR. 2. Develop the tools to plan and build the structure of the SBR. 3. Identify what must be avoided during the negotiation of an SBR.	A.3, D.3, D7		No	One hour	Pre-Recorded
<b>Fundamental Principles of Effective Inventory Management - (4 - One hour Sessions)</b> 1. Understand the financial implications of inventory to your organization's success. 2. Learn tools to be utilized to best manage inventory accuracy and eliminate waste. 3. Discover key elements of dealing with excess and obsolete materials in your inventories. 4. Review the process of the selection and implementation of inventory management software.	C.3, D.5		No	4, 1-hour sessions	Pre-Recorded
<b>Richard Dawe</b>	<b>Director of Operations &amp; Supply Chain Management Program, Golden Gate University</b> <b>Coming Fall, 2016</b>				
<b>Tom DePaoli, PhD</b>	<b>Dept. Head, School of Management, Marian University</b>				
<b>Reengineering Purchasing</b> Understand the steps to reengineer a purchasing organization. Be able to recognize some of the tools to help reengineer purchasing. Understand the new strategic purchasing training required to reengineer purchasing.	A.1, A.5, A.6, C.5		Yes	1/2 day up to 3 days	
<b>Supply Chain Management</b> Understand the process required to transform an organization into a supply management organization. Be able to create a project plan to get to a	A.5, C.5		Yes	1/2 day up to 3 days	

## SEMINARS

supply chain management organization. Be able to design supply management metrics.					
<b>Negotiations</b>	A.3		Yes	1/2 day up to 3 days	
Understand the different types of negotiations tactics. Understand the principles of adversarial, win-win and information negotiations. Be able to plan and execute negotiations sessions.					
<b>Sourcing</b>	A.2, C.4		Yes	1/2 day up to 3 days	
Understand a disciplined and methodical approach to sourcing. Understand which types of sourcing strategies should be used for particular services and materials. Be able to lead a cross-functional team for sourcing.					
<b>Lean Six Sigma</b>	LEAN, F.2, F.4, F.5		Yes	1/2 day up to 3 days	
Understand the basic concepts of Lean Six Sigma. Understand the DMAIC process. Understand the basic tools of Lean Six Sigma					
<b>Kaizen</b>	LEAN, F.2, F.4, F.5		Yes	1/2 day up to 3 days	
Understand the purpose of a kaizen. Understand the kaizen process and tools used. Be able to design metrics for the new process.					

## SEMINARS

<b>Yasser Dessouky</b>	Chair, Department of Industrial and Systems Engineering, San Jose State University				
<b>Lean</b>	LEAN, F.2, F.4, F.5		Yes	One day	
Use several lean tools such as 5S, Visual Management, Quick Change Over (QCO/SMED) and Mistake Proofing (poka-yoke) to eliminate waste					
and improve a value stream. Understand the material flow on a Lean Production Line, in particular the difference between push and pull					
systems and Determine Takt time for a given process and then use the takt time to analyze the production process.					
Understand when to use the 7 Tools of Quality to improve the quality and reliability of a Value Stream.					
<b>Quality Management</b>	B.6, F.2, F.4		Yes	One day	
Apply Cost of Quality as a quality metric tool. Differentiate between inherent and special causes of variation and apply statistical based					
methods to characterize and reduce the inherent variation in the design and manufacture of products. Differentiate between statistical control					
control and process capability: Construct and design control charts for the appropriate problem and Prepare a process capability study.					
<b>Supply Chain Management &amp; Modeling</b>	C.5		Yes	One day	
The strategies and concepts are covered with the analytical tools necessary to solve supply chain problems including differentiating between the					
Supply Chain, the channels within it, and the Logistics function. The fundamentals of supply chain modeling in the areas of inventory planning,					
transportation planning, and discrete location and facility planning.					
Information sharing and risk pooling mechanisms for controlling uncertainty-driven costs and leveraging economies of scale/scope in supply chains					
<b>Simulation Modeling &amp; Analysis</b>	C.5, D.1, F.1		Yes	One day	
Compare and contrast simulation with analytic and statistical modeling approaches. Prepare the steps of a simulation study via construction of a					
simulation model. Analyze process data and select an appropriate distribution to model a process and design an appropriate statistical techniques to analyze the output from simulation experiments.					
<b>Applied Statistics &amp; Operations Research</b>	C.5, D.1, F.1		Yes	One day	
<b>APPLIED STATISTICS</b> - Discuss, with many examples, the subjects of sample space, event, probability, probability distribution, common discrete					
and continuous probability distributions, conditional probability distribution, probabilistic modeling, etc.. Demonstrate the meaning and power of					
the Central Limit Theorem, the Law of Large Numbers, etc.. Introduce the fundamentals of Engineering Statistics, including charting, interpreting,					
and analyzing the data; statistical hypothesis testing; estimation of the parameters of a probability distribution (point estimation and confidence interval).					
<b>OPERATIONS RESEARCH</b> - Explain, formulate, and solve mathematical programming problems. Explain, formulate and solve CPM/PERT.					
Explain, formulate and solve Decision Analysis Problems					
<b>Integrated Production Management</b>	F.4, F.5, F.15		Yes	One day	
Apply forecasting methodologies and models used in inventory planning and control. Apply advanced inventory methodologies and models used in					
sales operation planning. Apply advanced inventory methodologies and models used in sales operation planning, master production scheduling,					



## SEMINARS

and material requirements planning. Apply short term scheduling models to maximize throughput and to minimize cycle times.					
<b>Ron Emery</b>	<b>VP Alchemy Associates</b>				
<b>Learning objectives coming</b>					
Dysfunctional Organizations	F.2, F.4, F.6, F.7		Yes	1/2 or 1 day	
Mentoring and Coaching	F.14		Yes	1/2 or 1 day	
Management vs. Leadership	A.1, F.4		Yes	1/2 or 1 day	
Principles of Management	A.1, F.4		Yes	1/2 or 1 day	
Leadership	A.1, F.4		Yes	1/2 or 1 day	
Marketing Intelligence	D.1, F.1		Yes	1/2 day	
Facilities Management	F.4, F.10		Yes	1/2 day	
Measuring Performance with KPI's	D.2, F.1		Yes	1/2 day	
Business Travel Procurement	A.1		Yes	1/2 day	
Warehousing/3PL	C.2, C.3		Yes	1/2 day	
Cloud Computing	F.4		Yes	1/2 day	
Vendor Management Systems	D.3, D.5, D.7		Yes	1/2 day	
HR Services	B.7, F.3		Yes	1/2 day	
Buying Capital Equipment	A.1		Yes	1/2 day	
Corrugated Board	A.1		Yes	1/2 day	
HR Benefits	F.3		Yes	1/2 day	
Buying Catering Services	A.1		Yes	1/2 day	
Buying Electricity	A.1		Yes	1/2 day	
Video Conferencing Equipment	F.4		Yes	1/2 day	
Risk Management	B.9		Yes	1/2 or 1 day	
<b>Robert Ferguson</b>					
<b>Learning objectives coming</b>					
Contracts - Introductory courses	A.4, E.1, E.2, E.3		Yes	1, 2 or 3 days	
Contracts - Intermediate courses	A.4, E.1, E.2, E.3		Yes	1, 2 or 3 days	
Contracts - Advanced/Executive courses	A.4, E.1, E.2, E.3		Yes	1, 2 or 3 days	

## SEMINARS

<b>Eldonna Fernandez</b>	<b>Principal, Think Like a Negotiator</b>				
<b>Think like a negotiator</b>	A.3		Yes	1, 2 or 3 days	
Understand the 6 steps to take in negotiation to reach a definitized agreement. Offer, Acceptance & Counteroffer the building blocks of contracts and negotiation. Know what to ask for, questions to ask and how to ask to get an agreement. Strategies to turn a discussion or disagreement to a more favorable result. How to think like a negotiator and ethically influence your outcomes. What to do to avoid the most common mistakes made in negotiation.					
<b>Leadership &amp; Team Building Mastery</b>	F.4, F.14		Yes	1/2 or 1 day	
Build the confidence to easily and effectively present/speak up in any environment. Ability to compose thoughts and present in a clear and concise manner. Respond to and manage questions and answers with control and authority. Organize and present your ideas or proposals to achieve wider acceptance and faster implementation. How to move through the phases of team building while minimizing the storm.					
<b>Contract Claims</b>	E.6		Yes	1/2 day up to 3 days	
Understand the aspects of contract administration that impact claims and disputes. Establish what issues/claims are and when they occur.					
Steps to avoiding a claim. Negotiation strategies in the claims process. Understand what contractual requirements are in relation to claims.					
<b>Business Relationship Management</b>	F.3, F.4,		Yes	1/2 day	
Managing Relationships in all phases of business from first meeting to final payment. The importance of building relationships first. Connection Builds Trust - Understanding the importance of connection in relationships. Building Rapport, how to manage communication in person, in writing and electronically. Understanding relationships in the contracting process (pre and post award). How to avoid the biggest mistake business owners make in relationship building. Understanding doing business with other cultures/countries and how to effectively build relationships with them.					
<b>Effective Communications (speaking &amp; presentation skills)</b>	F.12		Yes	One day	
Build the confidence to easily and effectively present/speak up in any environment. Have the ability to compose thoughts and present in a clear and concise manner. Respond to and manage questions and answers with control and authority. Organize and present your ideas or proposals to achieve wider acceptance and faster implementation. How to reduce the fear of presenting/interviewing/briefing/ or speaking to a group. Tools for effective connection with an audience - tonality, body language, gestures and power.					
<b>Self Leadership</b>	F.2, F.4, F.5, F.13		Yes	One day	
Understand how to intentionally influence your way of thinking, feeling and believing to achieve you and your company's objectives. Learn the strategies for self-discipline to create an internal accountability system. How to laser focus on achieving your daily tasks and long term personal and professional goals. Make faster and better decision and improve results. Build better relationships, reduce stress, engage and Make faster and better decisions and improve results empower yourself/your work force.					
<b>Contracts 101</b>	A.4, E.1, E.2, E.3		Yes	1/2 day	

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Understand the contract basics and feel more confident about your contracts and agreements. Know the difference between a contract and an agreement. Learn the 6 elements of contract formation. Experience offer, acceptance, counteroffer and rejection of offer.					
How to ask for consideration in contractual situations.					
<b>Henry Garcia</b>	<b>President, Asentrene, Inc.</b>				
<b>Information Technology Courses</b>					
<b>Information Technology Project Management</b>	IT, B.1		Yes	1, 2 or 3 days	
A general introduction to IT Project Management.					
<b>Project Management for IT Professionals</b>	IT, B.1		Yes	1, 2 or 3 days	
Understand the tenants of traditional project management as they apply to IT development environments. Appreciate the project flow for appropriate phases of an IT development. Successfully utilize the “best practices” tools as applied to the IT environment					
<b>Requirements Management for IT Professionals</b>	IT, B.1		Yes	1, 2 or 3 days	
Defining the scope of the IT project through correct elicitation/determination of requirements. Appropriate documenting, analyzing and configuration managing the IT project requirements. Managing the IT project requirements throughout the life of the project, including change control.					
<b>Risk Management for IT Professionals</b>	IT, B.1, B.9		Yes	1, 2 or 3 days	
Understanding and recognizing the likely risks and their causes in an IT development. Comprehend the “best practices” approach to identify, qualify/quantify, and respond to risks in an IT development.					
Demonstrate the “best practices” approach to dealing with risk in an IT development.					
<b>Managing Multiple IT Projects</b>	IT, B.1		Yes	1, 2 or 3 days	
Understand the approaches used by project managers dealing with multiple IT projects. Comprehend the “best practices” preferred method for dealing with multiple IT projects including while in a portfolio management environment. Explore techniques for organizing and successfully managing multiple simultaneous IT projects.					
<b>Producing “Quality” in IT Projects</b>	IT, B.1, B.6		Yes	1, 2 or 3 days	
Understand the concept of “quality” in an IT development. Comprehend the various aspects of planning quality, quality assurance, and quality control in an IT development. Explore techniques and “best practices” for planning and executing “quality” in an IT development.					
<b>Using Agile Project Management for IT Projects</b>	IT, B.1		Yes	1, 2 or 3 days	
Understand the strengths and weaknesses of traditional (waterfall) project management in an IT development. Understand the tenants of Agile project management in an IT development environment. Explore the techniques needed by the Agile development team in an IT development.					
<b>Using Critical Chain Project Management for IT Projects</b>	IT, B.1		Yes	1, 2 or 3 days	
Understand the basis of resource availability and management approaches (such as CCPM) to scheduling the project in an IT development.					
Comprehend how a CCPM schedule works including managing resource bottlenecks and buffers. Explore the use of techniques which demonstrate CCPM in an IT development.					
<b>Project Management Courses</b>					
Fundamentals of Project Management 0100	B.1		Yes	1, 2 or 3 days	
Code of Ethics & Professional Conduct in Project Management 0119C	B.1		Yes	1, 2 or 3 days	
Project Management Practicum/Simulation 0120	B.1		Yes	1, 2 or 3 days	
Project Management Professional (PMP) Exam Review 0121	B.1		Yes	1, 2 or 3 days	
Project Scope Management 0123	B.3		Yes	1, 2 or 3 days	

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Project Time Management 0124	B.4		Yes	1, 2 or 3 days	
Project Cost Management 0125	B.5		Yes	1, 2 or 3 days	
Project Procurement Management & Procurement Negotiation 0126	B.10		Yes	1, 2 or 3 days	
Project Quality Management 0127	B.6		Yes	1, 2 or 3 days	
Project Risk Management 0128	B.9		Yes	1, 2 or 3 days	
Project Communications Management 0129	B.8		Yes	1, 2 or 3 days	
Project Human Resource Management 0130	B.7		Yes	1, 2 or 3 days	
Earned Value Management & Reporting ACAP-0105	B.1		Yes	1, 2 or 3 days	
Practical Risk Management in Projects ACAP 0106	B.9		Yes	1, 2 or 3 days	
Writing an Effective Project Management–Oriented SOW ACAP-0107	B.3		Yes	1, 2 or 3 days	
Quantitative Tools & Techniques for Project Managers ACAP-0108	B.1		Yes	1, 2 or 3 days	
Critical Chain Project Management ACAP-0109	B.1		Yes	1, 2 or 3 days	
Effectively Managing Multiple Projects ACAP-0110	B.1		Yes	1, 2 or 3 days	
Project Management for IT/IS Professionals ACAP-0120	IT, B.1		Yes	1, 2 or 3 days	
Project Management Fundamentals Applied to Construction Projects ACAP-0125	B.1		Yes	1, 2 or 3 days	
Risk Management for Projects 0010	B.9		Yes	1, 2 or 3 days	
Cost, Time and Scope Management 0101	B.3, B.4, B.5		Yes	1, 2 or 3 days	
Quality and Risk Management 0102	B.6, B.9		Yes	1, 2 or 3 days	
Procurement and Negotiations Management 0103	B.10		Yes	1, 2 or 3 days	
Communications and Human Resource Management 0104	B.7, B.8		Yes	1, 2 or 3 days	
Project Management Capstone 0105	B.1		Yes	1, 2 or 3 days	
Scope and Time Project Management 0116	B.3, B.4		Yes	1, 2 or 3 days	
Cost, Procurement and Negotiation Project Management 0117	B.5, B.10		Yes	1, 2 or 3 days	
Quality, Human Resource and Mediation Project Management 0118	B.6, B.7		Yes	1, 2 or 3 days	
Quality Project Management 018A	B.6		Yes	1, 2 or 3 days	
Risk and Communications Project Management 0119	B.8, B.9		Yes	1, 2 or 3 days	
<b>Supply Management Courses</b>					
Negotiations for Supply Managers 0610	A.3		Yes	1, 2 or 3 days	
Purchasing & Supply Management Trends 0611	A.5, C.5		Yes	1, 2 or 3 days	
CPSM Certification Exam Review 0612	C.5		Yes	1, 2 or 3 days	
IT–Related Acquisitions & Contract Negotiations 0613	A.1, A.3		Yes	1, 2 or 3 days	
Preparing an Effective SOW or SOO 0615	E.5		Yes	1, 2 or 3 days	
Generational Differences in Cross–Functional Teams 0616	F.14		Yes	1, 2 or 3 days	
Selecting Subject Matter Expert Consultants & Sub-Contractors 0617	C.4, F.3		Yes	1, 2 or 3 days	
Overview of Continuous Improvement 0618	F.4		Yes	1, 2 or 3 days	
Cost/Price Analysis & Supplier Evaluation 0619	D.1, D.2, F.1		Yes	1, 2 or 3 days	
Developing Strategic Alliances with Consultants & Sub-Contractors 0620	D.3		Yes	1, 2 or 3 days	
Value–Based Pricing Strategies 0621	D.2, D.3		Yes	1, 2 or 3 days	
Enhancing the Accuracy of the RFP Process 0622	A.4		Yes	1, 2 or 3 days	
Implementing a Supplier Diversity Program 0623	D.3, D.6		Yes	1, 2 or 3 days	
Pre-Award Contract Selection & Preparation 0624	A.4		Yes	1, 2 or 3 days	
Post-Award Contract Implementation & Administration 0625	A.4		Yes	1, 2 or 3 days	
Continuous Improvement in Purchasing/Contracting Operations 0626	A.1, A.4		Yes	1, 2 or 3 days	
Competitive Bidding 0627	A.1		Yes	1, 2 or 3 days	
Financial Management for Non-Management Personnel 0628	F.2		Yes	1, 2 or 3 days	
Purchasing Quality 0629	A.1		Yes	1, 2 or 3 days	
Estimating Cost – A Holistic Approach 0630	F.1		Yes	1, 2 or 3 days	
Performance-Based Service Contracting 0631	E.3,E.5		Yes	1, 2 or 3 days	

## SEMINARS

<b>Marilyn Gettinger</b>	<b>Principal, New Directions Consulting Group</b>				
<b>Finance for Non-Financial Managers</b>	F.1		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: understanding financial terminology and financial documents. Using financial methods for accurately determining the financial soundness of suppliers. Documenting the value of supply management savings and project successes in financial terms.					
<b>Introduction to Supply Management</b>	A.5, C.5		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices through: Understanding the evolution and development of supply management principles.					
Discussing the responsibilities of a supply management professional. Identifying the skills, knowledge, and personal qualities necessary for success in the supply management field.					
<b>Negotiations</b>	A.3		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Defining negotiation and its role in the supply management area. Reviewing various types negotiations, strategies, tactics, organizational issues, and interpersonal factors. Exploring the negotiator's framework phases including preparation, face-to-face, narrowing the differences, bargaining, closure, and documentation					
<b>Advanced Negotiations</b>	A.3		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Identifying and developing skills for negotiating success such listening and questioning techniques. Detailing the preparation phase including resource identification and process management. Exploring the use of concessions, options, and expert testimony.					
<b>Strategic Sourcing</b>	A.2, C.4		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Defining strategic sourcing and the elements of a strategic sourcing initiative. Developing a total spend and supply base data bank. Setting up a commodity and supplier segmentation process and establishing strategies for each segmentation.					
<b>Supply Base Management</b>	D.4		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Identifying a comprehensive list of existing suppliers, available suppliers, potential suppliers, and developing suppliers for their strategic materials, products, and services. Defining various types of supplier relationships and identifying supply requirements. Optimizing the existing supply base and establishing evaluation and development initiatives. Developing a documented process for managing a total supply base management program.					
<b>Risk Management</b>	B.9		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Developing, implementing, and managing a total cross-functional risk management program. Identifying potential internal and external risks. Using the risk matrix including risk identification, probability, impact level, prevention, containment, and remediation.					
<b>The Green Revolution in Supply Management</b>	D.6, F.2		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Defining the green revolution and the various green considerations. Understanding and using the language of green. Identifying opportunities in reducing waste, recycling, reuse. Finding cost reduction possibilities through green supply					

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management.					
<b>Price and Cost Analysis and Management</b>	D.1, F.1		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Defining and discussing price analysis versus cost analysis and their usage in making an					
accurate supply decision and in negotiating successfully. Working with the cost analysis framework to identify accurately material costs,					
overhead, labor, and other critical inputs. Identifying price based products and services and information resources					
<b>Supply Management - Purchasing Law</b>	E.1, F.9		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Learning the various laws that impact the supply professional in handling purchase orders					
and contracts. Understanding terms and conditions and the battle of the forms. Preventing legal conflicts through improved communication					
with suppliers and legal professionals.					
<b>Ethics and Social Responsibility in a Global Environment</b>	D.6, F.8		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Learning and discussing the current supply management ethics policies of the Institute of					
Supply Management and the ethics requirements of their own organization. Discussing the social responsibilities of organizations working in a					
global environment and their impact. Developing a compliance program to ensure that ethics guidelines and social initiatives are implemented					
and followed.					
<b>Compliance Management in Supply</b>	A.4, D.2		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Establishing a compliance management initiative. Identifying areas of necessary compliance:					
ethics, internal requirements, social responsibility, IT requirements, etc. Communicating and collaborating with internal users for compliance					
management success.					
<b>The Effective Supplier Evaluation Process</b>	D.2		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Defining the supplier evaluation process, its importance, and its benefits. Implementing and					
managing a supplier evaluation program. Determining the supplier evaluation measurement process, criteria, and cross functional participation.					
Determining the supplier evaluation measurement process, criteria, and cross functional participation					
<b>Cost Reduction Initiatives</b>	A.1, F.1		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Establishing a documented cost management initiative and plan. Taking another					
look at low					
hanging fruit cost reduction areas. Exploring opportunities for cost reductions internally, externally, and throughout the supply chain.					
<b>The Successful Supply Management Department</b>	A.5		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Identifying best practices exhibited by successful supply management departments.					
Using the supply management department checklist to identify gaps between what is and what is a best practice. Implementing important					
strategies for establishing the supply management department as a critical contributor to organizational success.					
<b>Best Practices in Supply Management</b>	A.5		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Identifying the skills, knowledge, and personal qualities for the successful supply professional today and tomorrow to support their organization's vision, mission, objectives, and goals. Determining supply					
management					
resources for the development and growth of the supply professional. Developing, implementing, and managing a competency model for					

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evaluating, training, and measuring development initiatives.					
<b>Developing Successful Bids and Contracts</b>	A.4, E.1, E.3, E.4, E.5		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Identifying the best practices in developing inclusive bid requests and their impact on					
writing successful contracts. Developing and using various templates for the bidding process. Establishing and using basic contract formats.					
<b>Contract Management</b>	A.4, E.1		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Understanding the role and responsibilities of contract management. Identifying all aspects					
aspects of the contract, grey areas, potential problems, and contractor management. Implementing a contract management process and					
communication plan for overseeing the contract from inception until closeout.					
<b>Transportation Management</b>	C.1		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Understanding the impact of transportation on total cost of ownership in receiving and shipping materials and delivering services. Identifying transportation requirements and costs to an organization by using the					
transportation checklist. Establishing, implementing, and managing a transportation management program.					
<b>Importing and Exporting</b>	C.1		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Understanding the importing process, resources, and regulations. Working with the					
exporting process, resources, and regulations. Identifying the challenges, total landed costs, and benefits of importing and/or					
exporting.					
<b>Understanding and Complying to Regulations in Logistics</b>	C.1		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Understanding existing regulations in the logistics arena such as documentation; hours of					
service; compliance, safety, and accountability; hazmat. Exploring resources for regulations such as Department of Transportation, Customs					
Border & Protection Agency, Federal Motor Carrier Safety Administration. Establishing compliance initiatives and identifying					
total cost of ownership factors.					
<b>Moving Freight - Understanding the Process Truck, Rail, Air, Inland Waterways</b>	C.1		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Understanding the various modes of transporting goods locally, nationally and					
internationally, their costs, benefits, and challenges. Discussing skills and knowledge necessary for selecting and managing the right mode of					
transportation. Identifying cost reduction opportunities through effective selection and management of freight movement mode					
<b>Understanding Documentation in Logistics</b>	C.1		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Identifying and reviewing the various documents used in logistics: Bill of Lading, importing,					
and exporting documentation and regulation sources. Completing a bill of lading and understanding terms and conditions.					
Using electronic data interchange and the Automated Commercial Environment processes.					
<b>Materials Management Overview</b>	C.3		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Defining materials management, its evolution, its benefits and challenges, and supply chain					
management impact. Designing, implementing, and managing a materials management concept in an organization.					
Identifying the impact of materials management on cost reduction initiatives, product development, and customer service.					

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<b>Inventory Management and Control</b>	C.3		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Understanding the impact of inventory and inventory management on an organization. Identifying the various classifications of inventory, cost factors, and organizational objectives and goals.					
Planning for inventory accuracy, effective inventory turns, minimal inventory levels, and high levels of customer service.					
<b>Forecasting Principles</b>	D.1, F.1		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Understanding the principles and importance of forecasting. Working with various forecast methods both quantitative and qualitative. Using forecast error methods to improve forecasting techniques.					
<b>Planning and Scheduling For Industry and Service Delivery</b>	C.1, C.2, C.3		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Identifying planning and scheduling methods for both manufacturing and service delivery.					
Using software for developing planning horizons. Using planning and scheduling terminology					
<b>Warehousing Principles</b>	C.2		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Defining warehousing operations, responsibilities, and types. Identifying various warehouse decision points such as location, size, racking, material handling equipment. Managing warehousing operations efficiently and effectively.					
<b>Customer Service Operations</b>	C.7, F.4		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Understanding the importance of customer service today. Ensuring high levels of customer service by understanding the voice of the customer. Implementing a customer relationship management initiative.					
<b>Total Quality Management</b>	B.6, F.2, F.4		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Defining and discussing the evolution of quality management principles. Discussing the impact of the voices of the customer, supplier, market, and staff. Exploring the impact of the supply professional on quality in products, in services, and on the organization.					
<b>Lean Principles and Application</b>	LEAN, F.2, F.4, F.5		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Defining lean concepts and working with the lean framework to identify non-value adding activities and processes. Implementing lean principles in an organization. Identifying cost reduction opportunities through the lean methodology.					
<b>Managing Change</b>	A.4		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Understanding the change management process and its importance in moving employees through initiatives. Using the macro-level change management process. Segmenting employees into change-ready levels and implementing strategies to support each level in successfully adapting to change.					
<b>Introduction to Project Management</b>	B.1		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Identifying and discussing the phases of the project management process. Looking at best practices in project management. Discussing skills and knowledge for successfully managing projects.					
<b>Advanced Project Management</b>	B.1		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Determining the feasibility of a project and presenting facts to decision makers. Writing an effective project management charter that lays the groundwork for a successful project. Managing a program of projects that meet budget and time constraints.					
<b>Supply Chain Management</b>	A.5, C.5		Yes	1, 2 or 3 days	Live



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Participants will gain knowledge and practices in: Defining supply chain management, its evolution, its impact, and its goals and challenges.					
Identifying steps in eliminating silos or functional focuses and developing collaborative cross-functional relationships. Determining customer requirements and designing a supply chain network that delivers on the requirements of the various customer segmentations.					
<b>Operations Management</b>	F.4		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Defining Operations Management, benefits, and challenges, Evaluating the operations management of an organization. Identifying the areas that fall under operations management and establishing objectives and goals for improvement.					
<b>Communication</b>	B.8, F.12		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Understanding the communication process: speaking, listening, writing. Dealing with diversity, generational differences, cultural background, and gender for communication effectiveness. Listening and speaking.					
<b>Those Difficult Conversations</b>	F.3, F.12		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Identifying and discussing difficult conversations. Preparing to deliver a difficult communication. Determining what to say and when for a positive impact.					
<b>Managing a Diverse Workplace</b>	A.1, F.3, F.4		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Appreciating the benefits of a diverse workplace and its impact on the department, organization, and customer base. Understanding cultural, gender, demographic, and generational differences. Managing a diverse workplace through building appreciation and respect for the skills and knowledge of employees.					
<b>Understanding Diversity</b>	A.1, F.3, F.4		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices through: Discussing the diverse workplace of today, its challenges and benefits. Exploring generational, cultural, gender, and demographic differences and similarities. Identifying communication and motivational skills to work collaboratively with diverse bosses, peers, and employees.					
<b>The Service Buy</b>	A.1, A.2		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Defining the service buy, service segments, benefits, and challenges. Creating an effective statement of work. Identifying cost reduction efforts in the service buy.					
<b>Performance Review Success</b>	F.4, F.5		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Setting objectives and goals for an effective performance review. Making performance review part of ongoing performance management. Using a framework for preparing and managing a successful review process.					
<b>Leadership in Management</b>	A.1, F.4		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Integrating leadership and management successfully. Identifying various forms of leadership. Selecting and using various leadership styles for the greatest impact.					
<b>Performance Management</b>	A.1, F.4		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Designing, implementing, and managing a performance management program. Using a framework for performance management of a department and/or employees. Establishing key performance indicators aligned with organizational objectives and goals. Scorecards and Dashboards.					
<b>Interviewing Success</b>	F.12		Yes	1, 2 or 3 days	Live

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Participants will gain knowledge and practices in: Developing a job description, skills, knowledge, and personal qualities that accurately reflect the.					
open position and its requirements. Preparing for a successful interview: legal restrictions, questioning techniques, resume review. Using various interview techniques and methods.					
<b>Standing Out With Presentation Skills</b>	F.11		Yes	1, 2 or 3 days	Live
Participants will gain knowledge and practices in: Identifying the importance of presentation in building a career, getting ideas accepted, and					
working collaboratively. Understanding basic guidelines in presenting and communicating.					
Using voice, posture, visuals, eye contact, introductions, summaries, etc. for successful presentations.					
<b>Omid Ghamami</b>	<b>President, Purchasing Advantage, MACS Master Instructor</b>				
<b>Learning objectives coming</b>					
21st Century Purchasing for Public Procurement Professionals	A.1		Yes	One day	Pre-Recorded
Power Purchasing Pro	A.1, A.6		Yes	One day	Pre-Recorded
Power Secrets of Purchasing Contract Law	E.1		Yes	One day	Pre-Recorded
Negotiation for Breakthrough TCO	A.3		Yes	One day	Pre-Recorded
Leveraging GSA, Piggybacking, and Purchasing Consortium Contracts	A.1, A.6		Yes	One day	
How to influence Bid Committees to Embrace Best Value Decision Making	A.4, F.14		Yes	One day	
Negotiation Planning for TCO for Public Purchasing Professionals	A.3		Yes	One day	
Total Cost Analysis for Public Procurement Best Value Decisions	A.1, D.2		Yes	One day	
Supplier Sourcing and Selection for Best Value in Public Procurement	A.6		Yes	One day	
Supplier Performance Management for Public Purchasing Professionals	A.5, D.2		Yes	One day	
Purchasing Contract Law for Public Procurement Professionals	A.4, E.1		Yes	One day	
Making the Contract Fit the Purchase in Public Procurement	A.4		Yes	One day	
Public Contract Management and Compliance	A.4		Yes	One day	
Driving Public Sector TCO Results Through SOW/Spec Analysis	A.4, E.3		Yes	One day	
Public Procurement Processes and Procedures	A.1		Yes	One day	
Public Procurement Organization Management	A.1, F.4, F.10		Yes	One day	
Public Procurement Strategic Planning of Initiatives and Results	A.6		Yes	One day	
Public Procurement Code of Conduct and Ethics	A.1, F.8		Yes	One day	
Leveraging Multi-Agency/State Spends for Efficiency and Value	A.1, A.6		Yes	One day	
Strategic Supply Base Management in Public Procurement	A.5, D.4		Yes	One day	
ePurchasing/Procurement Strategies in Public Purchasing	A.1, E.8		Yes	One day	
Public Procurement Leadership in Action	A.1, F.4, F.15		Yes	One day	
Public Procurement Risk Management and Audit Strategies	A.1, B.9, D.1		Yes	One day	
Commodity/Category Management Strategies for Public Purchasing Professionals	A.1, C.6		Yes	One day	
Establishing Purchasing Value for Management, End Users, and Bid Committees	A.1, C.7		Yes	One day	
Public Procurement Process Re-Engineering	A.1, F.2		Yes	One day	
Best Practices in Purchasing & Negotiations in Public Procurement	A.1, A.3		Yes	One day	
Driving Center Lead Public Procurement Strategies	A.1, F.2		Yes	One day	
How to Purchase Performance Results Instead of Goods & Services in the Public Sector	A.1		Yes	One day	
<b>LeRoy Graw</b>	<b>President, International Purchasing &amp; Supply Chain Management Institute</b>				
<b>Procurement Fraud and Its Prevention</b>	A.1, A.4		Yes	1 or 2 days	4 Week Online
Identify management and auditor's responsibilities for the detection and investigation of contract fraud. Identify fraud schemes and indicators					
that are common to government contracting programs. Explain procurement regulations and contracting practices of government agencies and					

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their policies and regulations concerning procurement fraud. Explain why small and minority business programs are susceptible to fraud and				
outline programs to help them reduce procurement fraud. Identify investigative techniques to assist criminal investigators in conducting				
procurement fraud investigations. Describe criminal, civil, administrative and contractual actions that can be taken in response to contract fraud.				
Explain special characteristics of fraud in electronic commerce.				
<b>Green Purchasing and Supply Chain Management</b> D.6		Yes	1 or 2 days	4 Week Online
Develop and manage a Green Purchasing and Supply Chain Management program. Apply the ISO 13000 Environmental Standard.				
Explain the various techniques of Green Purchasing. Explain what it takes to be successful in Green Purchasing. Apply Credit Card User Guidelines for Green Purchasing. Explain how Biobase Purchasing is used in Green Purchasing. Apply energy star purchasing techniques.				
<b>Supply Chain Risk Management</b> B.9		Yes	1 or 2 days	4 Week Online
Apply risk management processes and techniques. Train organization personnel as risk professionals and managers (everyone is a Risk				
Manager). Minimize and attenuate risk in the supply chain. Explain how to evaluate and minimize supplier risk.				

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<b>eProcurement</b>	E.8	Yes	1 or 2 days	4 Week Online
Explain how managers use eProcurement methods and techniques.				
Define and explain online negotiations, forward auctions, reverse auctions,				
forward auctions, supply chain, exchanges, e-catalogs, search engines, content, and other eProcurement terms and concepts. Explain how				
e-catalogs work: how to use search engines, content creation and management, supplier integration, features/functions. Apply end to end				
procurement processes including strategic sourcing using eProcurement techniques. Explain how eProcurement systems and tools are used to				
acquire maintenance contracts, consultant services, and other services. Explain the use of technology in making electronic payments.				
<b>Buyer's Technical Representative</b>	A.1	Yes	1 or 2 days	4 Week Online
Explain the Role of the Buyer's Technical Representative. Describe the relationship of the Technical Representative to the other members of the				
Procurement and Contracting Team. Explain the role of the Technical Representative in Advance Procurement Planning, Solicitation Planning,				
Evaluation and Award, Post-Award Administration, and Contract Closeout.				
<b>INCOTERMS 2010</b>	C.1, E.1, E4	Yes	1 or 2 days	4 Week Online
Describe and define Incoterms. Explain why US sellers and buyers need to know and apply INCOTERMS in DOMESTIC as well as				
INTERNATIONAL CONTRACTS AND PURCHASE ORDERS. Explain how INCOTERMS are used in domestic and international purchasing.				
Describe the responsibilities of the Seller and Buyer under Incoterms 2010. Explain how Incoterms are used in Domestic and International				
Contract and Purchase Order transactions.				
<b>Lean and Agile Supply Chain Management</b>	LEAN, A.5	Yes	1 or 2 days	4 Week Online
Explain how supply chain managers establish and manage Manufacturing and Supply Chain Strategy. Describe Lean				
Manufacturing and Supply Chain Strategy and explain why it is such an important Supply Chain				
Strategy. Explain the Benefits/Cost of Lean and methods of implementation				
(Kanban, JIT, etc). Describe Agile Manufacturing and Supply Chain				
Strategy and explain why it is such an important Supply Chain Strategy.				
Explain the Benefits/Cost of Agile and methods of implementation (SCRUM, DSDM, XP). Describe Agile Project Management and explain why				
it is such an important Supply Chain Strategy. Explain the Benefits/Cost of Agile Project Management and methods of implementation .				
<b>Warehouse and Inventory Management</b>	C.2, C.3	Yes	1 or 2 days	4 Week Online
Explain the role of the warehouse in the modern supply chain.				
Describe and explain the various warehouse technologies and the functions they				
perform. Explain basic and advanced inventory management principles. Explain how to control, report, and verify status of stock.				
Describe the various duties and roles of the warehouse manager and warehouse supervisor.				
<b>Contracting for Architect-Engineering Services</b>	A.4	Yes	1 or 2 days	4 Week Online
Explain the several Federal and State laws governing A&E contracting, Describe the various services performed by A&E firms.				
Explain how to select A&E firms. Explain how to negotiate, write, award, and administer A&E contracts.				
<b>Construction Contracting</b>	A.4	Yes	1 or 2 days	4 Week Online
Explain the several Federal and State laws governing construction contracting. Describe the nature of construction and related services.				

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Explain how to solicit & evaluate bids & proposals for construction services. Explain how to write, award, & administer construction contracts.					
<b>Collaborative Planning, Forecasting, and Replenishment (CPFR)</b>	D.1, F.1		Yes	1 or 2 days	4 Week Online
Describe and Explain: Collaborative Commerce Dynamics. Collaborative Commerce Barriers. The CPFR® Process/Reference Model.					
CPFR® Benefits to the implementing businesses. Globalization of CPFR®. VICS & VICS CPFR® Committees. How Standards Enable Collaborative Commerce. The 4 CPFR activities. The 8 CPFR collaborative steps. How various retailers have implemented CPFR.					
The factors for success in CPFR implementation.					
<b>Financial Supply Chain Management</b>	A.5, F.1, F.2		Yes	1 or 2 days	4 Week Online
Explain the tools and techniques available to the purchasing and supply chain manager to assist the Chief Financial Officer in the following					
financial programs and objectives: Working Capital (Including Inventory/Stock) Optimization. Supplier Risk Management.					
Supply Chain Financing. Tax Optimization Purchasing. Impact of purchasing and supply chain management on key financial performance ratios.					
Efficiency of the accounts receivable and accounts payable processes.					
<b>Differences: Public and Private Sector Procurement</b>	A.1		Yes	1 or 2 days	4 Week Online
Explain and Describe: What are the major differences between public and private sector procurement?					
What can the public sector learn from the private sector? What can the private sector learn from the public sector?					
<b>Accounting and Finance for Nonfinancial Managers</b>	F.1		Yes	1 or 2 days	4 Week Online
Explain and Describe: Key accounting and finance terms: assets, liabilities, capital, depreciation, capitalization, current ratio and others.					
The accounting process: journals and ledgers, how debits and credits work. Mastering the mind-set: see business in terms of dollars-and-cents					
decision options that pay off—short- and long-term. Basic accounting and financial management principles.					
<b>Project Management for Procurement and Contracting Professionals</b>	B.10		Yes	1 or 2 days	4 Week Online
This course introduces Project Management and its relationship to Procurement and Contract Management. It identifies the tools and techniques to resolve problems associated with bringing projects in on time and within an established budget.					
<b>Service Purchasing and Contracting</b>	A.1, A.4				
The key differences between purchasing services and purchasing supplies, materials, and equipment. The Performance Based Service Purchasing Process. Recommended solicitation, evaluation, and source selection processes for services. ePurchasing for Services.					
Labor Laws Affecting Service Purchasing.					
<b>Jim Haining</b>	<b>Senior Purchasing Analyst, Clark County, Nevada</b>				
<b>Real-life Contract Development: What is Important in Developing Your Contract?</b>	A.4, E.3		Yes	1/2 day	
Supplier managers are tasked with the developing contracts that protect their employer and accurately reflect the agreement of the parties.					
Many contracts are legally correct, however, they do not cover the important business aspects of the agreement. It is the supply management professional's responsibility to ensure that both legal and business aspects of the contract are correct and protect the company's					
interests. After all, if it is not in the contract, it is not part of the agreement. This workshop will help you 1) focus on and identify the terms and					

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conditions that are important for your company. 2) understand the relevance of contract clauses. 3) develop a contract that accurately reflects the work to be done and the agreement of the parties.					
<b>Developing an Effective Scope of Work: The First Step to Supplier Performance</b>	A.4, E.4		Yes	1/2 day	
Developing a clear, concise and effective scope of work is essential to ensure that the supplier(s) understand the requirements of the good/service request. This understanding will lead to superior supplier performance and overall success. This workshop will:					
1) review the need for a scope of work. 2) cover which items should and should not be included in a scope of work.					
3) determine how the items included in the scope of work enhance or diminish supplier performance.					
<b>Price Indexing: How to Use the BLS Website to Calculate your Price Adjustment</b>	D.1			Two hours	Live
Want the best prices on your contracts from Day One? Confused by price indexes and which one to use? At price adjustment time, not sure the					
supplier is asking for a fair and reasonable price adjustment? Missing out on cost savings opportunities by asking for price decreases?					
This workshop will help you understand: 1) the difference between the most common price indices and how to choose the right price index for					
your contract. 2) how to develop the best price escalation / de-escalation language for your contract. 3) how to use the BLS website to easily					
verify the percentage change in prices for the most common indices.					
<b>Ken Jones</b>	<b>Director, Education and Applied Solutions, Western Michigan University</b>				
<b>CPSM Certification Exam Prep</b>	CPSM		Yes	1, 2 or 3 days	
Understand the Institute of Supply Management's CPSM Exam requirements and content areas of emphasis. Learn over 30 effective					
test-preparation and test-taking strategies, tactics and tips. Practice on multiple exam questions with a thorough review of answers.					
Depending on the length of session, cover the content associated with the major areas of emphasis to ensure understanding and application.					
<b>Understanding Supplier Pricing and Costs</b>	F.1		Yes	1, 2 or 3 days	
Covers the techniques required to implement proactive, data-driven cost and pricing management strategies. Provides buyers with					
the tools required to assess which commodities can benefit from cost-based tools, like detailed cost breakdowns, and those that are effectively					
managed by price-based tools, including e-auctions and multi-round bidding.					
Explains the multiple approaches to determining supplier costs: historical benchmark models, cost breakdown models, should cost models, target					
costing, linear correlation and regression models. Walk away with Excel-based tools for analyzing supplier costs and prices.					
<b>Legal Issues in Purchasing</b>	E.1		Yes	1, 2 or 3 days	
Cover the most common legal concerns for a best-in-class purchasing organization. Review the major sections of the Uniform Commercial Code					
and how the laws guide transactions between buyers and sellers. Learn how to structure individual transactions and long-term contracts to					

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manage an organization's legal interests effectively. Understand the role of negotiation in establishing effective commercial agreements.					
<b>Supplier Risk Analysis</b>	B.9		Yes	1, 2 or 3 days	
Discover the rationale for implementing a supplier risk management system. Understand the common frameworks, areas of coverage, and					
analytical tools involved with a supplier risk management system. Learn the internal and external resources required to implement and maintain					
an effective supplier risk management system.					
<b>Developing Commodity Strategies</b>	A.6, C.6		Yes	1, 2 or 3 days	
Learn how to establish measurable commodity objectives that reflect company goals using the proven SMART format. Analyze which party					
has the power in the buy-sell relationship and develop strategies to improve buy-side power. Develop clear and concise commodity storyboards.					
Walk away with Excel-based tools for analyzing buyer/seller power and developing commodity story boards.					
<b>Strategic Sourcing Process Fundamentals</b>	A.6C.4		Yes	1, 2 or 3 days	
Discover the frameworks and tools for purchasing value creation. Learn how to segment which spend categories are the idea candidates for					
strategic sourcing. Understand the steps associated with best-in-class strategic sourcing processes. Walk away with Excel-based tools for					
analyzing buyer/seller power and developing commodity story boards.					
<b>Effective Strategies for Buying Capital Equipment</b>	A.1		Yes	1, 2 or 3 days	
Understand strategic approaches to the procurement of capital equipment. Receive hands-on use of segmentation methods to categorize and					
manage your capital equipment and suppliers. Learn effective price-management tools, including States of Work (SOW). Learn how to complete					
a financial analysis to optimize price and value in a capital equipment sourcing decision. Acquire negotiation techniques to use with capital					
equipment suppliers.					
<b>Strategic Negotiations</b>	A.3		Yes	1, 2 or 3 days	
Learn the processes to maximize results from both the collaborative and competitive negotiation models, Discover how to recognize and counter specific competitive tactics. Receive detailed negotiation					
planning tools to achieve better results from negotiations. Understand how					
preparation, power and knowledge are the major forces that drive negotiation outcomes. Learn how to assess and improve the power					
dynamics					
between buyer/seller, commodity/product and negotiating companies.					
<b>Mike Kolodisner</b>	<b>President - Pro-Train, NIGP Master Instructor</b>				
All classes are 1 day, but may be expanded to 2 and 3 days on a case by case basis.					
<b>Writing Effective Statements of Work</b>	A.4, E.3		Yes	One day	
At the conclusion of this course student will: Be able to develop a mission statement and purpose to guide development of a statement of work.					
Be able to find and employ references to assist in building effective statements or work. Be able to recognize and use the most effective type					
works statement for the outcome that they require. Be able to develop and analyze a work breakdown structure to build a statement of work.					
Be able to employ the technique of value analysis to build an effective work statement. Be able to write and structure a statement of work so					

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that it is clear and enforceable. Be able to recognize inappropriate and appropriate language to incorporate into a statement of work.					
Be able to incorporate the statement of work into enforceable contract provisions.					
<b>Contract Administration for the 21st Century</b>	A.4		Yes	One day	
At the end of the session students will: Be able to identify and understand the most important areas of an outsourcing contract.					
Be able to interact appropriately and effectively with contractors. Be able to identify the most important area for contract monitoring and					
effectively oversee and perform contract administration and monitoring.					
<b>Developing and Managing Public Sector RFPs</b>	A.4		Yes	One day	
At the conclusion of the this course, students will: Be able to develop work statements to incorporate into public sector RFPs. Be able to					
recognize and incorporate appropriate terms and conditions. Be able to lead customers and evaluation committees in developing and					
weighing RFP evaluation criteria. Be able review submitted proposals and determine which are and which are not responsive. Be able to lead					
RFP evaluation committees through the proposal evaluation process. Be able to lead or assist in negotiation with successful respondent(s).					
<b>The New Buyer's Toolkit</b>	A.1		Yes	One day	
At the conclusion of this course student will: Understand and be able to explain to others the process and rationale of public sector purchasing.					
Be able to recognize the criteria for selection of the most appropriate solicitation process. Be able to recognize the basic legal principles that					
affect public purchasing. Be able to employ basic contracting principles in order to assemble a legal contract. Be able to employ and instruct					
others on the principles and requirements of contract administration. Be familiar with the basic principles of effective warehousing and be able					
to employ the formulas for determine appropriate inventory levels. Understand and deal with the criteria for valid solicitation protests.					
<b>Basic Legal Principles in Public Purchasing</b>	E.1		Yes	One day	
At the conclusion of this course student will: Be able to recognize and have an understanding of the basic laws that affect public purchase					
including unfair and illegal trade practices, intellectual property rights, laws and rules associated with contract breaches. Be able to understand					
and employ the rules regarding contract interpretation. Be able to recognize, follow and employ the laws and rules of agency.					
Be able to recognize the basic elements of a contract and determine whether purchasing documents include those elements.					
<b>Best Practices in Public Purchasing</b>	A.1		Yes	One day	
At the end of the session students will: Be able to identify the most crucial practices to creating effective purchasing. Be able to recognize and					
employ tools and techniques to improve purchasing performance. Be able to employ strategic purchasing in their organization.					



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<b>Andrew Kwok</b>	<b>Manager, Strategic Sourcing - Eaton Corporation</b>				
<b>CPSM 1 - Foundations of Supply Management</b>	CPSM		Yes	1, 2 or 3 days	
This review course is for candidates preparing for the CPSM® exam. In this course, participants gain an understanding of the following areas:					
Contracting and negotiation, Social responsibility, Cost and finance, International Sourcing, Supplier relationship management.					
<b>CPSM 2 - Effective Supply Management Performance</b>	CPSM		Yes	1, 2 or 3 days	
This review course is for candidates preparing for the CPSM® exam. This course provides participants with an understanding of the following areas:					
Forecasting, Materials and inventory management, Logistics, Organization and department assessment, Product and service development,					
Quality, Planning.					
<b>CPSM 3 - Leadership in Supply Management</b>	CPSM		Yes	1, 2 or 3 days	
This review course is for candidates preparing for the CPSM® exam. This course provides participants with an understanding of the					
following areas: Leadership, Risk and Compliance, Strategic Sourcing.					
<b>Tim Leh</b>	<b>Director of Strategic Sourcing - The Hershey Company</b>				
<b>CPSM 1 - Foundations of Supply Management</b>	CPSM		Yes	Two days	
Review supply management principles from a leading edge perspective. Understanding of key concepts regarding supplier relationship					
management, legal responsibility and international issues. Learn key supply management practices to implement sustainability and social responsibility in early supplier development and ongoing operations.					
Preparatory course to obtain certification (CPSM – Certified Professional					
in Supply Management) Module 1.					
<b>CPSM 2 - Effective Supply Management Performance</b>	CPSM		Yes	Two days	
How to successfully implement a supply management performance program to effectively reduce cost, improve quality with on-time delivery.					
Understand the role that supply management in regards to operational issues (project management, new product and service development).					
Supply management role in the overall supply chain as it relates to warehousing, logistics, asset and inventory management along with quality					

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control of products and services. Preparatory course to obtain certification (CPSM – Certified Professional in Supply Management) Module 2.					
<b>CPSM 3 - Leadership in Supply Management</b>	CPSM		Yes	Two days	
Leading and managing in today's environment with a forward outlook along with talent development to become best-in-class. Understanding					
and applying solid strategic sourcing principles as well as outsourcing and compliance. How to develop a risk management program and					
effectively mitigate supply risk in regards to products and services. Preparatory course to obtain certification (CPSM – Certified Professional in					
Supply Management) Module 3.					
Supplier Management	A.5	Coming 2017	Yes	1 or 2 days	
Negotiations (Basic)	A.3	Coming 2017	Yes	1 or 2 days	
Negotiations (Intermediate)	A.3	Coming 2017	Yes	1 or 2 days	
Negotiations (Advanced)	A.3	Coming 2017	Yes	1 or 2 days	
Spend Analysis	F.1, F.2	Coming 2017	Yes	1 or 2 days	
Cost Modeling	F.1, F.2	Coming 2017	Yes	1 or 2 days	
Supply Chain Financial Analysis	D.1, F.1, F.2	Coming 2017	Yes	1 or 2 days	
Global Business Strategies	F.4	Coming 2017	Yes	1 or 2 days	
International Business in Supply Chain	F.4	Coming 2017	Yes	1 or 2 days	
Early Supplier/Purchasing Involvement	D.3	Coming 2017	Yes	1 or 2 days	
E-Technology Tools in Supply Chain	E.8	Coming 2017	Yes	1 or 2 days	
Supply Chain Risk Management	B.9	Coming 2017	Yes	1 or 2 days	
Business Law in Supply Chain	E.1	Coming 2017	Yes	1 or 2 days	
Leadership in Supply Chain Management	F.4, F.10	Coming 2017	Yes	1 or 2 days	
Sourcing Real Estate	A.1	Coming 2017	Yes	1 or 2 days	
Construction Sourcing	A.1	Coming 2017	Yes	1 or 2 days	
<b>Elizabeth Lions</b>	<b>President, Elizabeth Lions Consulting</b>				
<b>Moving From Individual Contributor to Leader</b>	F.4		Yes	1, 2 or 3 days	Live
Defining Leadership vs managing. The decision to move from individual contributor to leader. Key Elements of Great Leadership.					
Team work – understanding how your performance is measured differently. Designing Your Leadership Style. Identifying the key factors in					
moving from contributor to manager.					
<b>Leadership Fundamentals</b>	F.4		Yes	1, 2 or 3 days	Live
Designing Leadership Style. Team work – understanding how your performance is measured differently. Assessing your new team. How to hire.					
How to fire. Fostering real teamwork. Team norms.					
<b>Career Management</b>	F.13		Yes	1, 2 or 3 days	Live
Overall employment market. Job market. Job seeking and how to stand out. Career Mapping (promotions). How to find the right job for you.					
How to negotiate your next salary.					
<b>Ethics</b>	F.8		Yes	1, 2 or 3 days	Live
Definition of Ethics vs Morals. Intention and Ethics. How to make an ethical decision. Why ethics are so critical to engineering.					
Ethical situations and Q&A.					

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<b>Visionary Leadership</b>	F.2 F.4		Yes	1, 2 or 3 days	Live
What is the visionary process in a leader. Why is it important? Look at the big picture at work. Combine business goals with your vision for your team. Team norms as a part of the visionary process.					
<b>Measuring success – how you know when it's all coming together</b>	F.4		Yes	1, 2 or 3 days	Live
What do you do as a leader if you can't get the team to move in the direction? How can you adjust your leadership style? When is it time to train an employee rather than fire an employee? What is the difference between telling and selling an employee? And which do you do when?					
<b>Emotional Intelligence</b>	F.4		Yes	1, 2 or 3 days	Live
What is Emotional Intelligence? Who is the founder of the theory? Why is it important in leadership? How to get more of this good stuff.					
<b>Soheila Lunney</b>	<b>Coming Fall, 2016</b>				
<b>Championship-Caliber Negotiations for Generating Maximum Value</b>	A.3		Yes	1 or 2 days	
The importance of preparing for successful negotiations. Common negotiation tactics and countermeasures. Evaluating your negotiating strengths and weaknesses. How to negotiate for win-win outcomes. Do's and Don'ts of effective negotiations. How to negotiate price increases.					
How to negotiate with single/sole source suppliers. Outsourcing and Group Purchasing Organizations (GPO) negotiations. Contract manufacturing negotiations. International negotiation skills and cultural differences. How to negotiate and secure quantifiable value-added services/provisions.					
<b>Fundamentals of Procurement and SCM: Foundation for World Class Purchasing Practices</b>	A.1, A.5		Yes	1 or 2 days	
Upon completion of this seminar, participants will learn: Have a sound understanding of Procure-to-pay (P2P) process. How to prepare comprehensive Request For Proposals (RFP), evaluating responses, and selecting suppliers. How to negotiate for win-win outcomes. When to negotiate and when to bid. How to protect organizations best interests. The impact of good purchasing practices on the bottom-line.					
How to get the most out of supplier relationships. Do's and Don'ts in dealing with suppliers					
<b>Championship-Caliber Negotiations, Contract Creation, and Contract Management</b>	A.3		Yes	1 or 2 days	
The importance of preparing for successful negotiations. Common negotiation tactics and countermeasures. Evaluating your negotiating style.					
Evaluating your negotiating strengths and weaknesses. The role of power, persuasion, and emotions in negotiations. How to leverage your buying power and reach win-win outcomes. How to negotiate price increases. How to negotiate with single/sole source suppliers.					
International negotiation skills and cultural differences. How to manage and shift control of the negotiations when back door selling occurs. How to reduce risks and get what you paid for. Do's and Don'ts of effective negotiations. How to establish and manage a successful contract management program. Buyer/seller positioning on key contract issues. Contract clauses focusing on added-value provisions/services.					
<b>Powerful Trends Impacting Purchasing Transformation to Strategic Procurement – Roadmap to Excellence</b>	A.1, A.6		Yes	1 or 2 days	
New trends impacting business environment. Leadership role and transformation scope. The importance of benchmarking and conducting					

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procurement gap analysis. Procurement metrics that matter. The value of a strategic plan and a robust strategic sourcing process. How best in class procurement and supply management practices are producing significant cost reductions for organizations. The significance					
of supplier relations and supplier performance management. How to effectively negotiate and manage contract lifecycle. The significance of					
compliance and risk management. The importance of sustainability and social responsibility					
<b>Patrick Lynch</b>	<b>ChainLEAnk Global Sourcing</b>				
APICS modules may be taken in any of the following 3 formats (per module): <b>A. 3 hours per night, 1 night per week for 10 weeks.</b>					
<b>OR B. 3 Saturdays @ 7 hours per session. OR C. 3 weekdays @ 7 hours per session.</b>					
<b>APICS Basics of Supply Chain Module</b>	CPIM		Yes	See above	
Fundamentals of Supply Chain Operations, Basic Inventory, Purchasing and Distribution Techniques and Metrics, Demand Management.					
<b>APICS Master Planning of Resources Module</b>	CPIM		Yes	See above	
Basics of MRP, Replenishing the Distribution Network, Dissaggregation of Demand for Pegging and Planning Detail.					
<b>APICS Execution of Control of Operations Module</b>	CPIM		Yes	See above	
Recovery to Variance of Actual vs Plans, Data Collection and Reporting, Quality Management and Continuous Improvement.					
<b>APICS Strategic Management of Resources Module</b>	CPIM		Yes	See above	
Capstone Course - Module Integration, New Technology and Tools, Strategic Development of Operations and Replenishment Process.					
<b>APICS Detailed Schedule and Planning Module</b>	CPIM		Yes	See above	
Inventory Management Techniques, Supply Chain Strategies, Bridging Master Planning & Execution and Control.					
<b>Risk Management/Supply Chain Risk Mitigation</b>	CPIM		Yes	One day	
Identifying Commercial Risks Which May Interrupt, Proactive Mitigation Mapping and Prioritization, Mitigation Implementation and Monitoring.					
<b>ISO 9001, 820.50 CFR Compliance Roadmap</b>	D.2		Yes	One day	
Current Good Manufacturing Practices (Gmp), FDA Guidance and Expectations, Minimal Compliance Standards and Evidence.					
<b>Irene Marnell</b>	<b>Board Member - ISM Risk Management Sub Group</b>				
<b>Leadership</b>	F.4, F.15		Yes	1/2 day	
What makes a person a leader? Myths about leaders. Leadership styles. What all leaders have in common. Integrity, charisma, communications,					
connecting. Influence and meeting new people. Becoming a more effective leader. Communicating a vision.					
Becoming a mentor. 1. Learn what it takes to be a leader. 2. Learn how to use the traits of a leader to be more effective in your daily interactions.					
3. Provide exercises to re-enforce your knowledge.					
<b>Contracting for Procurement Professionals</b>	A.3		Yes	One day	
What procurement professionals should know about contracts, including: What is a contract? Elements of a contract. Types of contracts.					
Key contract terms and why they are important. Supplier tricks. 1. Learn important elements of contracts. 2. Understand key terms.					
3. Learn how to make your contracts more effective.					
<b>CPSM Certification Training</b>	CPSM		Yes	3-5 days	
Review of CPSM Exam Content: Certification overview. CPSM Exam 1 - Foundations in Supply Management. CPSM Exam 2 - Effective Supply					
Management Performance. CPSM Exam 3 - Leadership in Supply Management. Learning Objectives: 1. Refresh your knowledge of key supply					

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management areas of influence. 2. Prepare for ISM Certification. 3. Provide exercises to reinforce student's knowledge.					
<b>Michael Matalone</b>	<b>President, Excelsior, Inc. &amp; XP3 Talent System</b>				
<b>The Talent Gap: How to Hire Top Talent</b>	F.3		Yes	One day	
Objective: Teaches hiring managers a scientific process and introduces them to tools to help them remove the typical subjectivity and replace with objective, facts-based decision criteria.					
<b>Retention: Assess, Develop and Manage Top Talent</b>	F.3		Yes	One day	
Objective: Teaches hiring managers a scientific process and introduces them to tools to help them assess their existing staffs strengths and weakness, develop and manage their people to help them retain a high performing team.					
<b>Darin Matthews</b>	<b>Director of Procurement, University of California, Santa Cruz</b>				
<b>Best Practices in Procurement</b>	A.1		Yes	One day	Live 2 hours
Discuss methods of procurement employed by world class organizations. Identify opportunities for strategic procurement initiatives.					
Evaluate the practicality of implementing best procurement practices.					
<b>Business Forecasting</b>	F.1		Yes	1 or 2 days	
Discuss various forecasting methods. Apply historical data to real life business situations. Understand the benefits of judgmental overrides.					
<b>Construction Contracting Tools</b>	A.4		Yes	1 or 2 days	
Gain familiarity with various methods of construction contracting. Discuss benefits of qualifications based selection processes. Apply tools and techniques that can improve construction contract management.					
<b>Basics of Public Procurement</b>	A.1		Yes	One day	Live 2 hours
Explore the history of public procurement legislation. Examine the generally accepted public procurement practices. Discuss case studies of public contracting challenges.					
<b>Sustainability in Procurement</b>	D.6		Yes	One day	Live 2 hours
Define sustainability and sustainable procurement strategies. Explore third party product certifications. Examine leading organizational practices to enhance sustainability.					
<b>Resolving Public Contract Disputes</b>	A.4, E.6		Yes	One day	Live 2 hours
Identify the type of disputes common in public procurement. Understand the importance of dispute language in ITBs & RFPs. Acquire lessons learned from public case studies.					

## SEMINARS

<b>Purchasing &amp; Supply Chain Management</b> Explore the evolving field of supply management. Review leading procurement methods. Discuss effective negotiation techniques.	A.1, A.5		Yes	1 or 2 days	
<b>Future of Supply Management</b> Explore the history of procurement and supply management. Identify trends in global supply chain. Acknowledge the necessary skills for success.	A.5				Live 2 hours
<b>Administering Contracts</b> Explore the phases of the acquisition process. Determine how upfront work can improve contract administration. Discuss techniques for cost and schedule control.	A.4		Yes	One day	Live 2 hours
<b>Logistics Management</b> Discuss the history of logistics throughout the world. Examine the terminology used in international shipping. Explore the various modes of transportation.	C.1		Yes	One day	Live 2 hours
<b>Supplier Management</b> Observe what approaches leading organizations employ. Understand the benefits of effective supplier management. Become familiar with tools for performance measurement.					
<b>Zai Phiroz</b>	<b>Professor, Supply Management, Harvard School of Business</b>				
<b>The Nature of Firms, Evolution of Supply Chain Management. Supply Chain Drivers and Metrics.</b> Explain and understand the nature of Supply Chain Management, and how it differs based on industry, size and objectives of companies. Explain the drivers of a Supply Chain, and how they may change at different points within a firms growth. Map the sequence of events in developing a supply Chain, and designing a supply chain network.	A.5, F.4		Yes	Two days	Live or recorded
<b>The Role of Supply Chain Management Within Fortune 500 Companies. Responses to Growing Economies.</b> Explain how the concept of supply chain management contributes to the overall operation and function of a company. Understand the different methods used by Fortune 500 companies in modifying and restructuring supply chains. Explain the interaction and impact between a supply chain and the external economy.	A.5, F.4		Yes	Three days	Live or recorded
<b>Design and Development of a Supply Chain Network.</b> Explain and interpret the objectives of designing a functional supply chain network, and the various designs of a supply chain. Decipher and describe the various methods of developing and refining a supply chain, with attention to industry, company size and	A.5, F.4		Yes	Two days	Live or recorded

## SEMINARS

corporate objectives. Demonstrate the progression of a supply chain.					
<b>Measuring and Analyzing the Value and Efficiency of a Domestic and Global Supply Chains Network.</b>	D.1, F.1		Yes	Four days	Live or recorded
Describe and explain the various methods of analyzing value within a supply chain. Describe and evaluate methods of analyzing efficiency and effectiveness of a supply chain network. Compare and contrast the design of supply chains, in consideration of business model.					
<b>Planning for Supply and Demand Within a Supply Chain.</b>	A.5, D.1		Yes	One day	Live or recorded
Describe methods of planning objectives and expectations for a supply chain, with respect to the nature of the industry.					
Understand the role of supply and demand, and economies of scale, on each point of a supply chain.					
<b>Barriers of Overall Supply Chains. Coordination Within a Supply Chain.</b>	A.5		Yes	Two days	Live or recorded
Understand and explain various components which hinders the progress of a supply chain. Explain how coordination within a supply chain takes place, and the value it brings to the overall chain. Explain various types of supply chain barriers.					
<b>Managing Variability Within a Supply Chain Network.</b>	A.5		Yes	1/2 day	Live or recorded
Describe methods of managing variability and uncertainty within a supply chain. Using case studies, gain an understanding of various types of vulnerabilities which cause variability within a supply chain.					
<b>Trends in the market, Growth Opportunities and Areas Which will Gain Focus.</b>	D.1, F.1		Yes	1/2 day	Live or recorded
Describes product, distribution and manufacturing trends in supply chain management, within multiple industries. Explain areas of innovation which major companies are focusing on, from purchasing to fulfillment.					
<b>Greg Pustelnik</b>	<b>Coming Fall, 2016</b>				
Request for Proposal (RFP), Request for Quotation (RFQ), Invitation for Bid (IFB), Request for Information (RFI)	A.4		Yes	1, 2 or 3 days	
Contract Administration	A.4		Yes	1, 2 or 3 days	
Contract Close-Out	A.4		Yes	1, 2 or 3 days	
<b>Zinovy Radovitsky</b>	<b>Chair Department of Management</b>				
	<b>Coming Fall, 2016</b>				
Supply Chain Forecasting	D.1, F.1				Live
Introduction to Operations and Supply Chain Management	A.5				Live
Operations and Supply Chain Analytics	D.1, F.1				Live
Quality Management and Six Sigma Quality	B.6				Live
Enterprise Resource Planning (ERP) Supply Chain Planning	A.5				Live
Service Operations Management	F.4				Live
Project Management	B.1				Live

## SEMINARS

<b>Edie Raether</b>	<b>Change Strategist: Speaker, Author, Coach</b>				
<b>Getting your Mules to Move: Brain Based Change for Optimal Performance</b>	F.2, F.4, F.5, F.13		Yes	1, 2 or 3 days	
Performance Objectives: 1.Reduce and delete mental blocks and barriers, 2. Create a "MindShift" to eliminate resistance to change. 3. Improve performance through TeamThink and FutureThink. 4. Improve communications respecting diversity of thinking styles.					
<b>Why Carrots &amp; Sticks Don't Work: Employee Engagement through Pride Based Motivation</b>	F.2, F.3, F.4, F.7		Yes	1, 2 or 3 days	
Objectives: 1. How to ignite your employee's inter entrepreneur. 2. Execute pride-based motivation: autonomy, mastery and purpose. 3. Discover the hidden costs and addictive nature of rewards. 4. Identify and overcome employee problems and appropriate actions. 5. Strategies to get employees to participate in the "solution."					
<b>Motivating the "What's in it for Me" Generation</b>	F.3, F.7		Yes	1, 2 or 3 days	
Objectives: 1. Methods to motivate and manage four diverse generations. 2. Develop leadership from transitions from control and compliance to autonomy and freedom. 3. Five creative ways to engage employees. 4. Implementing the five essential elements to self-motivation. 5. Execute a model that overcomes the epidemic of narcissism. 6. Learn how to hire and keep top talent.					
<b>The Art of Negotiation: How to Let Someone Else have Your Way</b>	A.3		Yes	1, 2 or 3 days	
Objectives: 1. Learn to implement the five steps of the negotiation process. 2. Learn to reframe: Transform reluctance into commitment. 4. Learn to deal with psychological warfare. 5. Learn to get to "yes" by leveraging power, time and information.					
<b>Taming the Everyday Tiger: Creating Calm from Chaos</b>	F.2, F.3, F.5, F.13		Yes	1, 2 or 3 days	
Objectives: 1. Learn to be proactive rather than reactive to conflict and crisis. 2. Develop skills in conflict resolution: Don't just cope, change it. 3. Develop time and energy management skills. 4. Discuss the power of perception and perspective. 5. Learn coping strategies and stress management.					
<b>Unstoppable Influence: The DNA of Persuasion</b>	F.12		Yes	1, 2 or 3 days	
Objectives: 1. Learn to implement the four cornerstones of empowerment. 2. Discuss the differences of influence, persuasion and negotiation. 3. Implementing outcomes by design, not by default. 4. Master the art and science of influence for transformational leadership. 5. Learn maneuvers and methods to escape the velvet prison: apathy.					



## SEMINARS

<b>Preventing Workplace Bullying &amp; Violence</b>	F.3, F.7		Yes	1, 2 or 3 days	
Objectives: Increase the awareness of all staff and supervisors on the destructive repercussions of bullying, aggression and violence.					
Implement a self-sustaining system of transparency and enforced policies and procedures. Identify types of anger and manage aggressive behaviors. Learn specific action plans and strategies to resolve issues and challenging behaviors.					
Develop a climate of civility and respect: See it, call it, stop it.					
<b>Creativity on Demand: From the No-Drift to the Idea Zone</b>	F.2, F.5, F.13, F.15		Yes	1, 2 or 3 days	
Objectives: 1. Learn the seven steps to making your team an idea generator. 2. Learn to overcome process paralysis.					
3. Develop strategies to move from dissonance to resolution. 4. Practical creativity for problem solving and conflict resolution.					
<b>Communicate Like a Pro: High Impact Presentation Skills</b>	F.11, F.12		Yes	1, 2 or 3 days	
Objectives: 1. Polish your presentation with psychological tools and triggers. 2. Retrain your brain to perfect your power of presence.					
3. Learn mental mastery to present with pizzazz and impact. 4. Design your "talk" with stories, metaphors, tempo, and emotions.					
<b>How to Write Marketing Copy that Converts</b>	F.12		Yes	1, 2 or 3 days	
Objectives: 1. Learn the psychology of words that work and action verbs. 2. Create a virtual experience: Inject emotion and ownership.					
3. Design and develop impact with the online culture. 4. Integrate a call to action.					
<b>LeaderShift: Changing the Way We Manage Change</b>	F.2		Yes	1, 2 or 3 days	
Objectives: 1. Learn a model that motivates, monitors, manages and measures change. 2. Learn tools to reduce resistance and improve performance. 3. Develop steps to create to activate a compelling vision. 4. Learn steps to develop followers into leaders.					
5. Learn the method that will mobilize the efforts of others for TeamThink.					
<b>Right-Brain Leadership, Creating Team Synergy</b>	F.4		Yes	1, 2 or 3 days	
Objectives: Develop a greater self-awareness of how one's behaviors affects others. Gain the ability to better give and receive candid feedback.					
Explore ways and means of fostering creativity, mutual respect, trust, and open communication in oneself and others. Develop different ways					
of leading and influencing others beyond the command-and-control style. Explore ways in which intuition can enhance innovation, creativity and					
productivity.					

## SEMINARS

<b>Putting Your Organization's Whole Brain to Work</b>	F.4, F.6		Yes	1, 2 or 3 days	
Objectives: 1. Define and describe the Whole Brain Model based on the HBDI. 2. Examine how thinking preferences affect behaviors in planning, communications and work performance. 3. Explore how the participant's behaviors reflect these styles. 4. Understand how to implement the results of the HBDI profiles.					
* HBDI is the Herrmann Brain Dominance Inventory					
<b>Innovate or Evaporate: Igniting Innovation to Reinvent Your Business</b>	F.4, F.5		Yes	1, 2 or 3 days	
Objectives: Create a culture of constant creativity for optimal performance. Unleash untapped powers of mind to create "idea generators."					
Ignite innovation: Cash in on creativity - the currency of the future. Develop your business intuition and learn to listen to hunches. Learn mind wandering techniques for creative problem solving.					
<b>Communicate with Impact: Is Anyone Listening</b>	F.12		Yes	1, 2 or 3 days	
Objectives: 1. Overcome blocks and obstacles to being a good listener. 2. Learn to confront the performance, not the person.					
3. Develop the art of creative questioning for interactive conversation. 4. Learn listening styles that build trust, rapport and team alignment.					
5. Implement the four keys to being an "observant" listener. 6. Develop a system of listening that separate content from feelings.					
<b>Effective Facilitation Tools &amp; Techniques</b>	F.11		Yes	1, 2 or 3 days	
Objectives: 1. Discuss how managers and leaders can become facilitators. 2. Learn to jump-start group interdependence. 3. Implement four essential elements of facilitation: Purpose, goals, roles and procedures. 4. Develop strategies to create compromise: How to capitalize on conflict.					
5. Implement three crucial processes: Planning, problem solving, tasks.					
<b>Customer Service: A Contact Sport</b>	C.7, F.4		Yes	1, 2 or 3 days	
Objectives: 1. Implement the five S.M.A.R.T strategies for customer satisfaction. 2. Learn to avoid the twelve deadly sins of customer service.					
3. Discuss "inside the box" and the importance of internal customers. 4. Implement the critical shift: Transform tough customers into raving fans.					
<b>Time Management</b>	F.4		Yes	One day	
Objectives: Develop systems - Delete, delegate, or just do it. Learn to prioritize - Defining what is urgent vs. important. Break bad habits - The email addiction and technology. Control interruptions - deal with deadlines. Overcome procrastination.					

## SEMINARS

<b>Diversity Training</b>	F.3, F.4		Yes	One day	
Objectives: 1. Understand diverse thinking styles: Right brain – left brain. 2. Create a culture of inclusion for a high-performance work team.					
3. Retrain the brain to break down barriers and biases. 4. Respect: Implementing core values. 5. Differentiate perception, facts and reality.					
<b>Organizational Skills</b>	F.4, F.6		Yes	One day	
Objectives: Develop and design systems of time and energy management. Learn the 3 P's of effective execution: Plan, prepare, prevent.					
Learn behavioral change methods to eliminate clutter. Make technology work for you: Go paperless.					
<b>Communication Skills</b>	F.4, F.12		Yes	One day	
Objectives: Learn strategies and style to have influence and impact. Demonstrate NLP (Neuro-Linguistic Programming) proficiency for change.					
Understand body language: The power of pitch, they truth about tone. Practice techniques to deal with difficult people. Master the art of inquiry					
and effective questioning. Implement the STAR Method: Situation, task, action, and results.					
<b>Tammy Rimes</b>	<b>Principal, Tammy Rimes Consulting</b>				
<b>Purchasing: Everything They Didn't Tell You About the Job, but You Need to Know!</b>	A.1		Yes	One day	
Discover what's on the horizon for government procurement across the nation. Discern the difference between negotiation and influence.					
Build a high performing team with 6 key strategies. Create a strategic working strategy with a customer service focus.					
Market the Value of Your team to the rest of the organization.					
<b>If Your Customers Had a Choice, Would They Choose You?</b>	F.4		Yes	One day	
Discover the Difference Between Product and Experience. Implement 5 Ways for a Successful Customer Service Program. Compare strategies					
and develop a survey that will be effective. Revamp your own forms and training classes for a better customer experience.					
Learn meaningful ways to be proactive and start making an immediate difference.					
<b>Government Speak: Successfully Write and Present Your Way to Success</b>	F.11		Yes	One day	
Prepare and learn the nuances of a successful and effective presentation. Discover the best techniques to keeping your audience's attention.					
Deal with tough or boring topics, and handling media interviews. Practice the art of storytelling to "sell" your message.					
Review the types of written communication and tips to be more effective.					

## SEMINARS

<b>Dancing With the Stars: How to Lead the Dance Toward an Effective Procurement Strategy</b>	A.1		Yes	One day	
Create a Vision, Mission and Goals for your Division. Learn the types of leadership vs. management skills needed. Uncover ways to be strategic					
across many responsibilities. Build a cooperative strategy. Develop a roadmap to take your team the next level.					
<b>Joe Shedlawski</b>	<b>Principal Consultant - JFS Associates, APICS Master Instructor</b>				
<b>APICS CPIM Modules:</b>					
<b>Basics of Supply Chain</b>	CPIM		Yes	Three days	
Understand basic businesswide concepts, including understanding various supply chain environments. Manage supply issues including demand, inventory, operations costs, and metrics. Prepare to pass the BSCM exam.					
<b>Master Planning &amp; Resources</b>	CPIM		Yes	Three days	
Apply the principles of demand management, sales and operations planning, master scheduling, and distribution planning.					
Understand the linkages between all of the levels of the plans for the business. Prepare to pass the MPR exam.					
<b>Detailed Scheduling &amp; Planning</b>	CPIM		Yes	Three days	
Translate product-level plans and schedules generated at the master planning level into requirements that can be procured or produced.					
Acquire a working knowledge of the tools and techniques for planning of inventory, including MRP, CRP, lean, TOC, and projects.					
Prepare to pass the DSP exam.					
<b>Execution &amp; Control of Operations</b>	CPIM		Yes	Three days	
Learn to translate plans into operational activities and define and apply techniques in the operations field. Understand the execution of quality initiatives and continuous improvement plans. Prepare to pass the ECO exam.					
<b>Strategic Management of Resources</b>	CPIM		Yes	Three days	
Acquire an understanding of how market requirements drive the resources and processes of an organization as part of its strategy.					
Develop knowledge of concepts that require a combination of elements and higher thinking within the entire CPIM body of knowledge.					
Prepare to pass the SMR exam.					
<b>APICS Principle Series</b>					
<b>Principles of Distribution &amp; Logistics</b>	CPIM, C.1		Yes	Three days	
Develop working knowledge of the foundations of planning and control in distribution and logistics. Learn the principles and activities of					
warehousing, transportation, and fulfillment. Grasp the concepts of supply chain management (SCM), and the principles, functions, and application of distribution requirements planning (DRP).					
<b>Principles of Inventory Management</b>	CPIM, C3		Yes	Three days	
Provide a fundamental understanding of inventory management principles and techniques. Examine inventory control roles and responsibilities					
and their impact on a business. Learn ordering techniques, replenishment policies, purchasing management, and inventory performance measurement.					
<b>APICS Train the Trainer</b>	CPIM		Yes	Two days	
Prepare adult professionals to teach training and development courses. Review 10 lesson plans for instructors with a successful and workable					
methodology that can be applied to teaching any subject. Consider learning styles, communication styles, and motivation in the development					
and execution of an effective presentation or course.					

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<b>Learning Dynamics for Instructors</b>	CPIM		Yes	Two days	
Examine the dynamics of the classroom and techniques to maximize learning, building upon the foundation developed in the prerequisite Train					
the Trainer (TTT) course. Gain a better understanding of learning principles and styles; discover how to select appropriate training methods,					
enhance listening and questioning skills, and handle challenging situations. Practice impromptu speaking and self analysis.					
<b>Material Requirements Planning</b>	CPIM		Yes	One day	
Thoroughly understand the inputs, outputs, and process of MRP, including gross to net calculation. Understand the Bill of Material and planning					
lead times and their role in MRP. See how a planner would use MRP in practice, to plan and control production.					
<b>Inventory Management</b>	CPIM, C3		Yes	One day	
Identify the different types of inventory and reasons for holding it. Calculate the costs associated with holding and ordering inventory, using					
different valuation methods. Learn lot sizing and safety stock methodology.					
<b>Project Management</b>	CPIM, B.1		Yes	One day	
Develop an understanding of the key concepts, functions, and benefits of project management. Learn by example to apply various project planning					
and tracking techniques. Understand the nine knowledge areas of project management, as defined by the Project Management Institute.					
<b>Paula Shoup</b>	<b>Coming Fall, 2016</b>				
Negotiation Skills	A.3		Yes	1 or 2 days	

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<b>Gurpreet Singh</b>	<b>Coming Fall, 2016</b>				
Lean Six Sigma Yellow Belt for Supply Chain Professionals	LEAN		Yes	Two days	
Lean Six Sigma Green Belt for Supply Chain Professionals	LEAN		Yes	3-1/2 days	
Procurement	A.1		Yes	Five days	
Procurement 20/20, The Future of Procurement	A.1		Yes	Five days	
Contracts Management	A.4		Yes	Five days	
Cross Cultural Negotiations	A.3		Yes	One day	
Category Management	C.6		Yes	Five days	
Supplier Relationship Management	D.7		Yes	Three days	
Strategic Sourcing	A.6, C.4		Yes	Five days	
Legal Services Sourcing	A.6		Yes	Two days	
<b>Barbara Teicher</b>	<b>Owner, Etc - Executive Training &amp; Coaching</b>				
<b>It's HOW You Say It®</b>	F.12		Yes	One day	
By the end of this program you will be able to: Diagnose the situations/people where a level of discomfort exists, and why. Learn the Five Reasons People Don't Like You! What's causing the disconnects in conversations and relationships?					
Confirm your perception is their reality to improve business results with the 6 steps in the "It's HOW You Say It®" principle.					
Learn how to make a V.A.S.T. difference to improve each conversation and strengthen relationships.					
<b>How to Say NO with Finesse</b>	F.12		Yes	One day	
By the end of the session you will be able to: Define the ultimate reasons for saying, "No." Determine when to "take the ball and run" or,					
"play softball and pitch." Weigh the risks and consequences. Determine the verbiage you should use because It's Not Just What You Say.					
"It's HOW You Say It."					
<b>The Personalities of Conflict, Which One Are You?</b>	F.12		Yes	One day	
By the end of this session you will be able to: Diagnose the real reasons for the conflict, Isolate the personality trait(s) causing issues.					
<b>How to BE the Person You Want Others to Think You ARE</b>	F.12		Yes	One day	
By the end of this session you'll be able to: Acknowledge the areas where who you are isn't who you truly want to be. Recognize the					
behaviors that make changing such a challenge. Define "The Five Steps" to making a difference. Determine which steps can change your legacy.					
Write page one in your "Book of Life."					
<b>How to S.P.E.A.K™. Professionally</b>	F.12		Yes	One day	
By the end of this session, you'll be able to: Recall steps for overcoming "The Fear Factor." Define the steps to S.P.E.A.K. professionally.					
Demonstrate skills to improve your presentations. Create a "Be Prepared" checklist.					

## SEMINARS

<b>Critical Thinking for Individuals</b>	F.5		Yes	One day	
By the end of this session, you'll be able to: Explore the dynamics of Critical Thinking in a System. Interact with/use Critical Thinking tools.					
Implement change more effectively. Create improvement in your work challenges.					
<b>Jim Ullum</b>	<b>Managing Partner, Source International</b>				
<b>Introduction to Supply Chain Management</b>	A.5		Yes	1, 2 or 3 days	
Overview of Supply Chain Management's (SCM) role in today's corporate world. Importance of SCM in overall organization.					
Career paths in SCM.					
<b>Advanced Supply Chain Management</b>	A.5		Yes	1, 2 or 3 days	
Negotiation Techniques & Strategies, Total Cost Analysis. International Supply Chain Management					
<b>Developing Product Specifications Requirements for Outsourced Suppliers</b>	E.5		Yes	1, 2 or 3 days	
Bill of Materials, Quality Specs, Quality Assurance Plan					
<b>Supply Chain Cost Savings Strategies &amp; Techniques</b>	A.1		Yes	1, 2 or 3 days	
Make vs Buy, Lease vs Purchase, Variable vs Fixed Costs					
<b>Performance Measures for Supply Management</b>	A.5		Yes	1, 2 or 3 days	
On Time Shipping & Lead-Times, Quality Metrics, Cost Savings Metrics					
<b>Strategic Sourcing &amp; Negotiation</b>	A.3, A.6, C.4		Yes	1, 2 or 3 days	
Low Cost Country (LCC) Sourcing. Due Diligence & Supplier Verifications. Negotiation Techniques & Strategies.					
<b>Critical Thinking for Individuals</b>	F.5, F.15		Yes	1, 2 or 3 days	
By the end of this session, you'll be able to: Explore the dynamics of Critical Thinking in a System. Interact with/use Critical					
Thinking tools. Implement change more effectively. Create improvement in your work challenges.					
<b>Tony Wai</b>	<b>Managing Director for SCMC Ltd</b>				
<b>Service Sourcing and Contract Management</b>	A.2, A.4, C.4		Yes	Two days	Live
From media advertising, event and marketing, travel, janitorial, security, facility management, fleet rental, to outsourcing, contracted work and					
professional service, service procurement bears special nature and demands special skills. This workshop explores the nature, risks and protection issue in service sourcing and contract management,					
develops special expertise in service level design, performance measurement,					
internal communication and related problem solving.					

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<b>Advanced Negotiations</b>	A.3		Yes	Two days	Live
Going beyond basic negotiation techniques and process, this workshop is a hands-on program that develops practical problem solving capabilities in real-world situations, with strategic analysis, gridlock resolution and innovative BATNA techniques, using a win-win approach					
that delivers true value to the final outcomes of a negotiation.					
<b>Sourcing, Supplier Analysis &amp; Evaluation</b>	A.2, D.1, D.2		Yes	Two days	Live
Referencing PASS®(Process of A Sourcing Success), a proven tool adopted by nearly 1000 multinational companies, this course develops					
practical techniques to source and select suppliers covering key activities and processes, using business-case based learning to illustrate the					
know-how on each step of sourcing with fine-tune adaptation to specific product, and guides purchase managers to source efficiently with					
best outcome.					
PASS® process covers 5 areas: supply market study and reporting; Request For Information (RFI) design and information analysis; Request					
For Quotation /Proposal (RFQ/REP) design and prices analysis; supplier onsite audit; supplier evaluation and selection.					
<b>Strategic Cost Analysis &amp; Management</b>	D.1, F.1, F.5		Yes	Two days	Live
Combining with advanced cost modeling and analysis technique, this course takes a strategic view on should-cost determination and holistic					
cost management across portfolio, offering practical and effective methodologies proven in multinational companies. You will be able to deploy					
what you learn from this class to create immediate cost saving results at work.					
<b>Basic Cost &amp; Price Analysis Techniques</b>	D.1, F.1, F.5		Yes	Two days	Live
This course focuses on the fundamental and critical skills supply management professional uses most frequently, drills down on the highly					
practical analysis techniques for all product and service that drives total cost performance, and helps to build effective sourcing analysis that					
result in optimized supplier selection.					
<b>Holistic Supply Chain Management for Practitioners</b>	A.5, C.5		Yes	Two days	Live
Most supply chain training only focuses on supply chain inventory optimization theory, lacking connectivity to the real world practitioners' job					
where every function has a fragmented but direct involvement of a piece of supply chain. This course will help you "zoom out" and give you					
back the full vision of the holistic supply chain and how the functions interact, thus developing a better understanding on how to maximize the					
benefits of supply chain for your own job.					
If you are not already a practitioner, you'll also learn the business functions of supply chain and how they coordinate for better synergy in the					
real world.					
<b>Supplier Management &amp; Development</b>	A.5, D.3		Yes	Two days	Live
It is difficult to find a qualified supplier and more difficult to find a qualified supplier who can make continues improvement. Facing the fluctuation					
of customer demand, short lead-time, unstable delivery and quality from supplier, the trainer will share participants with latest supplier development and management methods in auto industry.					
Participants will grasp the right concept and effective ways in China and Asia to control and improve supplier quality performance.					
<b>Transforming Customer Experience for Shared Service Excellence</b>	F.2, F.4		Yes	Three days	Live
Internal customers expect more from shared services than outside providers, as a trusted partner and problem solver. Delivering that					



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exceptional customer experience and achieving shared service excellence demands a complete re-making in mindset, culture, attitude and behavior, plus a great deal of understanding in stakeholder engagement, customer communication, service structure and strategy. This is even more compelling if your organization was newly transformed from internal business function into a shared service center.					
<b>Mark Weis, JD</b>					
<b>Software Licensing from the Licensor's &amp; Licensee's Perspective</b>	E.1		Yes	One day	
Learn to understand and analyze the legal and practical issues in software licenses. Learn the issues in software licenses related to "the cloud."					
Learn how to minimize risks and maximize your rights.					
<b>Intellectual Property 101</b>	E.1		Yes	1/2 day or 1 day	
Learn the basics of patents and patent rights. Learn the basics of trademarks and trademark rights.					
Learn the basics of copyrights and copyright rights.					
<b>Confidentiality Agreements</b>	E.1		Yes	1/2 day	
Learn how to analyze when and where a confidentiality is needed. Learn what a confidentiality agreement protects.					
Learn what a well drafted confidentiality agreement contains.					
<b>Professional Services Agreements</b>	E.1		Yes	One day	
Learn to understand and analyze the legal and practical issues in professional services agreements.					
Learn the issues in professional services agreements related to intellectual property rights.					
Learn how to minimize risks and maximize your rights.					

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<b>Long Term Supply Agreements</b>	E.1		Yes	One day	
Learn to understand and analyze the legal and practical issues in long term supply agreements. Learn what a well drafted long term supply					
agreement contains. Learn how to minimize risks and maximize your rights.					
<b>Intellectual Property (IP) Licensing Agreements</b>	E.1		Yes	One day	
Learn to understand and analyze the legal and practical issues in intellectual property licensing agreements. Learn what a well drafted					
intellectual property licensing agreement contains. Learn how to minimize risks and maximize your rights.					
<b>Joint Development Agreements</b>	E.1		Yes	One day	
Learn to understand and analyze the legal and practical issues in joint development agreements. Learn what a well drafted joint development					
agreement contains. Learn how to minimize risks and maximize your rights.					
<b>Understanding Legal and Business Issues in Technology Licensing Agreements</b>	E.1		Yes	One day	
Learn to understand and analyze the legal and practical issues in technology licensing agreements. Learn what a well drafted technology					
licensing agreement contains. Learn how to minimize risks and maximize your rights.					
<b>Understanding Legal and Business Issues in Technology Development Agreements</b>	E.1		Yes	One day	
Learn to understand and analyze the legal and practical issues in technology development agreements. Learn what a well drafted technology					
development agreement contains. Learn how to minimize risks and maximize your rights.					
<b>Understanding Legal and Business Issues in Development Agreements</b>	E.1		Yes	One day	
Learn to understand and analyze the legal and practical issues in development agreements. Learn what a well drafted development					
agreement contains. Learn how to minimize risks and maximize your rights.					
<b>Understanding Legal and Business Issues in Consulting Services Agreements</b>	E.1		Yes	One day	
Learn to understand and analyze the legal and practical issues in consulting agreements. Learn what a well drafted consulting services agreement					
contains. Learn how to minimize risks and maximize your rights.					

## SEMINARS

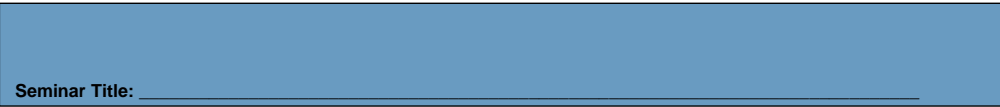
<b>Matt Werder</b>	<b>Chief Technology Officer, Senior Director - Enterprise Technology Solutions</b>				
<b>Creating Your Own Personal Advisory Board</b>	F.13		Yes	One day	
Learning Objectives: Discuss why everyone should create a personal advisory board. Determine how to select members to be on your personal advisory board.					
Explain how to make the most of your personal advisory board.					
<b>Introduction to Lean</b>	LEAN		Yes	One day	
Learning Objectives: Understand the basic operating principles of lean process improvement. Gain an understanding of how to apply learn tools in the					
supply chain. Complete a process improvement action plan using lean in a real-world example.					
<b>Capital Procurement</b>	A.1		Yes	One day	
Learning Objectives: Define capital procurement processes.					
Understanding contract management strategies relating capital procurement.					
Develop negotiation strategies for capital equipment services.					
<b>Patrick Woods</b>	<b>President, Supply Chain Education</b>				
CLASSES/COURSES OFFERED	A.1		Yes	One day	
<b>Implementing Strategic Sourcing</b>	A.1, D.1		Yes	One day	
This course will show you how to put it all together through 7-key steps which consist of (1) the database, (2) strategies, (3) financial,					
(4) sources, (5) partnerships, (6) inputs and (7) metrics and will show how to implement Strategic Sourcing as used by many of the Fortune					
100 firms. Objectives include: developing five supply strategies, utilizing econometric models, incorporating change management, utilizing					
performance measurements, forming and aligning stakeholders, performing make vs. buy analysis and rolling out the plan.					
<b>Fundamentals of Supplier Relationship Management</b>	E.1		Yes	One day	
The starting point in this major initiative is to engage in Supply Base Rationalization (Optimization) which focuses on both the number of					
suppliers and the mix (the relationship that you establish with each one). We also bring in the ever-popular Pareto Analysis (ABC) where					
you date your "C" suppliers, go steady with your "B" suppliers and get married to your "A" suppliers. customer-supplier marriage – sometimes,					
divorce (called the Supplier Exit Strategy). This course will then explore the benefits and methods in order to have successful customer-supplier					
relationships. Objectives include: performing spend segmentation and leverage, developing TCO models, encouraging supplier innovation,					
implementing diversity programs, utilizing the SCOR model and conducting supplier evaluations.					
<b>21<sup>st</sup> Century Negotiations</b>	C.4		Yes	One day	
The course is dividing into two main parts – preparing for the Negotiation (which involves a detailed plan) and executing the Negotiation.					
Objectives include: conducting a SWOT analysis, utilizing the Porter Model, incorporating key preparation factors, preparing for the BATNA,					
reviewing 22 skill sets, utilizing key tactics, developing a detailed negotiation plan.					
<b>Managing Risk in the Supply Chain</b>	D.2, D.3		Yes	One day	
Risk Management is defined as: "directing or conducting the activities necessary to reduce, eliminate or mitigate the factors that could lead					

## SEMINARS

to injury, loss, damage or failure. Objectives include: defining risk, following a five-step approach, creating supplier risk profiles, contrasting					
the six risk categories, understanding key law, developing contract language and avoiding employee law suits.					

## SEMINARS

<b>Principles of Contracting</b>	D.2		Yes	One day	
Do your contracts and customer/supplier agreements have "teeth" or are they nothing more than a collection of legal jargon that nobody					
reads, much less understands; until there is a legal issue? Objectives include: reviewing four contract elements, understanding the UCC.					
contrasting price vs. cost contracts, developing SLAs, incorporating "teeth clauses" of price change, volume rebates and mutual cost reduction.					
<b>Applications in Cost Modeling</b>	A.5, A.6		Yes	One day	
In this presentation, we focus on four key areas, (1) Cost Modeling Elements, (2) Should Cost vs. Target Cost, (3) TCO- Total Cost of					
Ownership models, and (4) Rolling out best-in-class practices to your supplier(s). Objectives include: understanding budgeting, contrasting					
TCO models, contrasting cost elements, behaviors and decisions.					
<b>21st Century Project Management</b>	B.9		Yes	One day	
Project Management is the discipline of carefully projecting or planning, organizing, motivating and controlling resources to achieve specific					
goals and meet specific success criteria. objectives, typically to bring about beneficial change or added value. Objectives include: reviewing					
pre-project factors, understanding and applying the planning, execution, monitoring-controlling and close-out phases, incorporating Six					
Sigma including the DMAIC concept, utilizing key TQM tools.					
<b>How to Optimize Logistics</b>	A.1, A.3, D.7		Yes	One day	
Logistics involves the three movements of into the facility, within the facility and out-to the customer. Objectives include:					
understanding factors such as site and building, identifying global markets/documentation and calculating TLC, engaging in					
Distribution Planning, including the use of technology, understanding and leveraging transportation, utilizing either domestic					
or INCOTERMS.					
<b>Fundamentals Of Inventory Management</b>	D.6		Yes	One day	
Objectives include: understanding the three inventory objectives, reviewing the major types of inventory, understanding the functions of					
inventory, utilizing safety stock, applying review methods, incorporating the ABC/cycle count approach.					
<b>CPSM - Certified Professional In Supply Management Review (3 Total Modules)</b>	A.3, A.4		Yes	One day	
The CPSM® 's emphasis on Supply Chain Integration is what allows you to continually evolve in the rapidly changing area arena that is					
supply management. The program consists of three modules and corresponding exams: Foundation of Supply Management, Effective					
Supply Management and Leadership in Supply Management.					
<b>CPIM - Certified Production &amp; Inventory Management Review (5 Total Modules)</b>	F.4		Yes	One day	
The primary purpose of this certificate program is to prepare you to sit and pass the five CPIM® exams which are divided into five modules					
and corresponding exams: Basics in Supply Chain Management, Master Planning of Resources, Detailed Scheduling and Planning,					
Execution and Control of Operations and Strategic Management of Resources.					

[illegible]

Date: \_\_\_\_\_

Seminar Title: \_\_\_\_\_

Name	Signature
afternoon session	



## Professional Development - Seminar Evaluation

Seminar Title: \_\_\_\_\_

Speaker/Presenter: \_\_\_\_\_ Date: \_\_\_\_\_

Why did you attend this seminar? (check all that apply) Topic \_\_\_\_ Speaker \_\_\_\_ Networking \_\_\_\_

Certification/Recertification \_\_\_\_ Other \_\_\_\_\_

Please rate the following on this scale: 1 = very bad, 2 = poor, 3 = neutral, 4 = good, 5 = excellent

How would you rate the instructor's knowledge of the subject matter? \_\_\_\_\_

Was the instructor's teaching style effective? \_\_\_\_\_

How would you rate the presentation? \_\_\_\_\_

Rate the following on this scale: 1 = strongly disagree, 2 = disagree, 3 = neutral, 4 = agree, 5 = strongly agree

The information presented will be useful to my job. \_\_\_\_\_

The supplemental materials/handouts were helpful/useful. \_\_\_\_\_

I would recommend this program to others. \_\_\_\_\_

Seminar Learning Objectives were met. \_\_\_\_\_

Please list the top three topics/concepts/tools presented that you can use on the job.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

What did you like most about this seminar? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What did you like the least about this seminar? \_\_\_\_\_

\_\_\_\_\_

Note: Scores given above should not reflect attendee opinions regarding the facility or any food/drinks that may have been provided.





# ACHIEVEMENT AWARD

be it known that

---

has completed the educational event entitled

---

**Sponsored by Material and Contract Services**

thereby qualifying to claim \_\_\_\_\_ hours of continuing education.

Date: \_\_\_\_\_ Program Director/Instructor (signature): Steven McCredie

-----

*Please retain this Achievement Award form with your files until applying for certification/recertification. Please contact ISM at 800\888-6276 if you would like more information about the Certified Professional in Supply Management (CPSM) as well the CPSD program.*

*Continuing education hours are earned by attending events such as seminars, conferences, or affiliate pre/post dinner meetings. For all events more than one hour, add the entire number of educational time attended to determine the number of continuing education hours earned. Count conference sessions and pre/post dinner meetings as single events and add the entire number of educational hours attended to determine the number of continuing education hours earned for those events.*

*Note: When completing an application for recertification you can determine the number of points earned by adding together all continuing education hours and dividing by seven.*



# **Material and Contract Services, Inc.**

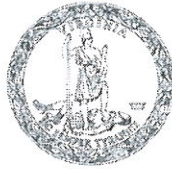
## **PROPOSAL REPLY**

COMMONWEALTH of VIRGINIA



## **CERTIFICATIONS**

**July 26, 2015**



# COMMONWEALTH of VIRGINIA

## Department of General Services

Division of Purchases and Supply  
Street

1111 East Broad

P.O. Box 1199  
Richmond, Virginia 23218-1199  
(804) 786-3842  
FAX (804) 225-3707

### AMENDMENT NO. 1 TO ALL OFFERORS:

Reference – Request for Proposal: RFP E194-1922  
Commodity: Training for Procurement Professionals  
Date: July 13, 2015  
Proposals Due: July 16, 2015 at 1:00 pm (See item #13)

The above is hereby changed to read:

1. Reference Attachment A NASPO ValuePoint Master Agreement Terms and Conditions #19. License of Pre-Existing Intellectual Property:

Change to read:

#### **#19. Use of Training/Course Materials**

- A. Catalog-Priced Training. The Contractor retains ownership rights to catalog-priced training materials offered under RFP section X A, with Purchasing Entities granted a license consistent with the catalog terms and conditions identified in the offeror's proposal. With respect to specially prepared case studies or scenarios used during the training, the Purchasing Entity retains the license rights in the second sentence of section 19B.
- B. Developed Courses. Subject to exceptions proposed by the Contractor in accordance with RFP section XVII B 5, and accepted by the Lead State, the Contractor retains ownership to pre-existing course materials in accordance with Attachment C, section 21, for any course that is priced as a developed course in accordance with RFP section X B, such ownership subject to the right by the Purchasing Entity to use the pre-existing course materials as contemplated in the Order. For other than pre-existing course materials, the Contractor grants to the Purchasing Entity a nonexclusive, perpetual, royalty-free, irrevocable, unlimited license to publish, translate, reproduce, modify, deliver, perform, display, and dispose of the course materials, and its derivatives, delivered under this Master Agreement. In negotiated Orders for developed courses, Contractor shall identify the third-party license terms and obtain, on behalf of the Purchasing Entity, written consent of the owner for use of the pre-existing course materials.

2. Reference Attachment A NASPO ValuePoint Master Agreement Terms and Conditions #2.Definitions:

Delete definition of "Acceptance."

3. Reference Attachment A NASPO ValuePoint Master Agreement Terms and Conditions #28.Standard of Performance and Acceptance:

Change to read:

**#28. Inspection**

All materials, equipment, supplies, and services are subject to inspection and testing. Items or services that do not meet specifications may be rejected. Failure to reject upon receipt, however, does not relieve the contractor of liability for latent or hidden defects subsequently revealed when goods are put to use or tested. If latent defects are found, the contractor is responsible for replacing the defective goods within the delivery time required by the Order and is liable for any resulting expense incurred by the Purchasing Entity.

4. Reference Attachment A NASPO ValuePoint Master Agreement Terms and Conditions #31.Title of Product:

Delete #31. Title of Product section. (Numbering for remainder of Attachment A does not change.)

5. Reference Section IX.B.1.a. Prior Notice Cancellation:

Change to read:

- d. In the event that a scheduled class is cancelled by a Participating Entity within 24 hours of class start time and the instructor has departed to travel to the class, the Contractor will be paid for instructor travel costs, travel-related costs, and lodging required for the Instructor to return back to the customary place of origin in accordance with the limitations and travel reimbursement policies delineated in the Participating Entity's travel regulations.

6. Reference Section IX.B.1.c. Inclement Weather Class Cancellation:

Change to read:

- c. Inclement Weather Class Cancellation: Participating Entity will not pay the Contractor for a scheduled training class cancellation because of closure from inclement weather. Participating Entity may reschedule the class upon mutual agreement with the Contractor. In the event that a scheduled class is cancelled by a Participating Entity because of inclement weather within 24 hours of class start time and the instructor has departed to travel to the class, the Contractor will be paid for instructor travel costs, travel-related costs, and lodging required for the Instructor to



return back to the customary place of origin in accordance with the limitations and travel reimbursement policies delineated in the Participating Entity's travel regulations.

7. Reference Section IX.D. Participating Entity Requirements:

Change to read:

5. Technical Requirements: Participating Entity will provide or make available the technical requirements (e.g., internet, VOIP, etc.) as may be necessary to conduct the training.

8. Reference Section IX.C.6. Contractor Requirements:

Change to read:

6. Contractor must provide all course materials for learners as part of the course offering unless a separate agreement and/or arrangement is made with a Participating Entity. Contractor may separately price instruments such as DISC, MBTI, etc., purchased from a third party as optional instructional materials

9. Reference Section XIII.B. Proposed Quote:

Change to read:

- B. Proposed Quote: Pricing shall be all-inclusive except for travel and travel-related expenses, and include all of the contractor's time, and training instructor and course material expenses. Any quote submitted by a contractor should clearly state in detail:

1. Master Agreement number;
2. Description of the services to be performed and course materials;
3. Third party purchased optional instructional materials (e.g., DISC, MBTI, etc.);
4. Quantity (e.g., days, hours, amount of course material provided, etc.);
5. Catalog price and contract discount percentages;
6. Any additional discount offered; and
7. Itemized and total price.

10. Reference Attachment A NASPO ValuePoint Master Agreement Terms and Conditions #17. Insurance:

Change to read:

- b. Coverage shall be written on an occurrence basis. The minimum coverage limits shall be as specified in Appendix B, section 10a through 10d.

11. Reference Section XIV.B. Payment Instructions:

Change to read:

B. PAYMENT INSTRUCTIONS

FOR **ALL** SALES OF PRODUCTS AND SERVICES UNDER ANY MASTER AGREEMENT:

1. NASPO ValuePoint Administrative Fee: Contractor shall pay an administrative fee to NASPO ValuePoint. Refer to Attachment A Item 26 for information on the administrative fee.

Note: The prices in an Offeror's response to Attachment E Offeror's Pricing Proposal Schedule will form the **base fee** and must include the NASPO ValuePoint Administrative Fee of .25% (1/4 of 1%).

FOR SALES OF PRODUCTS AND SERVICES WITHIN THE COMMONWEALTH OF VA:

2. Surcharge Adjustment Fee Payment: For services provided within the Commonwealth of Virginia, the Contractor shall be required to provide a Contractor's Quarterly Report of Sales and a Surcharge Adjustment Fee (SCA) payment. Refer to Attachment C Item 14 for information on the sales report and the SCA fee.
3. EVA Vendor Transaction Fee: Contractor shall pay the vendor transaction fee for each order issued through the Commonwealth's e-procurement website "eVA". Vendor transaction fees are determined by the date the original purchase order is issued and the current fee schedule. Refer to Attachment B Item 14 entitled "*eVA Business-To-Government Vendor Registration, Contracts, and Orders*" for more information on eVA fees.

Note: The SCA Fee and eVA Vendor Transaction Fee must NOT be included in the Offeror's prices in Attachment E Offeror's Pricing Proposal Schedule.

Other Participating Entities may have administrative or similar fee(s) which will be included on the individual Entity's Participating Addendum and are in addition to the base fee described in #1 above. Any Participating Entity and contractor may propose adjustments to the base fee in their Participating Addendum for any number of reasons and agreement to the proposed adjustments is a business decision for both parties. Neither party will be required to enter into a Participating Addendum if no acceptable agreement can be negotiated.

12. Reference Attachment E Offeror's Pricing Proposal Schedule:

Replace with Amendment 1 Attachment E Offeror's Pricing Proposal Schedule.

13. Reference Cover Sheet and Section XVIII.B.8:: Proposal Due Date and Time:

Change to read:

Due Date and Time: July 30, 2015 at 1:00 P.M. Eastern Time.

**Note:** A signed acknowledgment of this amendment must be received attached to your proposal. Failure to return the amendment may be grounds for removing the proposal from further consideration. **Signature on this amendment does not substitute for your signature on the original proposal document. The original proposal document must be signed.**

Cordially,

*Katherine A. Bosdell, CPPB, VCO*

Katherine A. Bosdell, CPPB, VCO  
Statewide Strategic Sourcing Officer/Contract Manager

*Material and Contract Services, Inc.*  
Name of Firm

*Dan P. Plunk*  
Signature/Title

*7-27-15*  
Date



# ATTACHMENT D-1

## OFFEROR PROFILE

OFFEROR NAME: Material and Contract Services, Inc.

Question	Response Y or N	Supporting Information*
1. Offeror meets the quality standards as described in Section I.B "Purpose".	Y	
2. Offeror is proposing procurement competency courses	Y	
3. Offeror is proposing business competency courses	Y	
4. Offeror is proposing project management courses	Y	
5. Offeror is proposing supply chain management competency courses	Y	
6. Offeror is proposing its complete course catalog	Y	
7. Offeror is able to tailor or customize standard course offerings	Y	
8. Offeror is able to develop fully customized courses	Y	
9. Offeror is able to provide multiple delivery platforms:	Y	
a. On-site classroom	Y	
b. Online instructor-led	Y	
c. Online self-paced	Y	
d. Webinars	Y	
e. Mobile	Y	
f. Other: Specify		
10. Offeror is able to deliver services in selected states only (specify state/s)	N	
11. Offeror is able to deliver services regionally only (specify geographic region/s)	N	
12. Offeror is able to deliver services nationwide	Y	
12. Offeror has a partnership with a college or university for course delivery and/or continuing education credit (specify)	Y	
13. Offeror has one or more curricula leading to national certification (specify)	Y	
14. Offeror has worked with other public procurement entities (specify)	Y	

\*Explanatory Notes (use additional pages if needed): Material and Contract Services, Inc. and its team of instructors/trainers have performed procurement, contracts management, supply chain, traffic and logistics work with the following: UC Berkeley, UC Davis, UCLA, Department of Transportation, Department of Energy, San Francisco State University, Cities of Concord, Oakland, Irvine, San Francisco, Sacramento, Palo Alto, UC Hastings, Berkeley, Costa Mesa, San Diego, Contra Costa Community College District, County of Orange, City of San Diego, City of Sacramento, City of Tucson, OrangeCounty Fire Authority, City of Los Angeles, Los Angeles Department of Water and Power, State of Utah, City of Newport Beach, Santa Clara Valley Water District, State of Illinois, State of Colorado, State of Idaho, State of Mississippi, US Federal Government. Private clients include: Disney, HP, Genentech, Kaiser Permanente, J. Paul Getty among others.



**ATTACHMENT D-2**

**COMMONWEALTH OF VIRGINIA  
RFP# E194-1922**

**PROPRIETARY INFORMATION IDENTIFICATION**

Name of Firm/Offeror: Material and Contract Services, Inc.

Trade secrets or proprietary material submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the Offeror must invoke the protections of *Code of Virginia* § 2.2-4342F, in writing, either before or at the time the data or other material is submitted. The trade secret or proprietary material submitted in the proposal must be identified by some distinct method such as highlighting or underlining, and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary material. Offeror shall complete and provide the "Proprietary Information Identification" form with a summary of this material in their Proposal response which must specifically identify the data or materials to be protected including the section and page numbers of the proposal in which it is contained, and state the reasons protection is necessary. The classification of an entire Proposal document, line item prices, and/or total Proposal prices as trade secret or proprietary is not acceptable and the Proposal may be rejected.

SECTION/TITLE	PAGE NUMBER(S)	REASON(S) FOR WITHHOLDING FROM DISCLOSURE
PRICE SECTION OF THE PROPOSAL - ALL PAGES	ALL PAGES	PRICE INFORMATION IS CONFIDENTIAL.

**RETURN OF THIS PAGE IS REQUIRED**

**ATTACHMENT D-3  
COMMONWEALTH OF VIRGINIA**

**RFP# E194-1922**

**EXCEPTIONS TO RFP# E194-1922**

Name of Firm/Offeror: Material and Contract Services, Inc.

Unless stated on this form, all Offerors will be considered to have accepted all terms and conditions of the RFP and any amendments as issued without exception. Offerors who wish to propose modifications to the contract provisions must clearly identify the proposed exceptions including the section and page numbers of the RFP, and submit any proposed substitute language; however, the provisions of the RFP cannot be modified without written approval by the DPS Statewide Strategic Sourcing Officer.

<i>SECTION/TITLE</i>	<i>PAGE NUMBER(S)</i>	<i>PROPOSED SUBSTITUTE LANGUAGE</i>
NONE		

**RETURN OF THIS PAGE IS REQUIRED**

**ATTACHMENT D-4  
COMMONWEALTH OF VIRGINIA**

**RFP# E194-1922**

**VENDOR DATA SHEET**

**Note: The following information is required and failure to submit all information requested may result in the Commonwealth requiring prompt submission of missing information.**

1. Qualification: The vendor must have the capability and capacity in all respects to fully satisfy all contractual requirements.
2. Vendor's Primary Contact:  
Name (Print): Dan P. Plute ne: \_\_\_\_\_
3. Years in Business: Indicate the length of time you have been in business providing this type of goods or services: Procurement Services Associates and Material and Contract Services  
\_\_\_\_\_ 25 Years Months
4. Vendor Information: eVA Vendor ID or DUNS Number: 17-880-7207
5. Provide information of at least three (3) current or recent accounts, either commercial or governmental, that your business has provided similar goods and/or services.

Company: City of Palo Alto, CA Contact: Mr. John Montenero

Address: 250 Hamilton Ave, Palo Alto, CA 94301

Phone : \_\_\_\_\_ 650-329-2300 Email: john.montenero@cityofpaloalto.org

Dates of Service: 2011 to current \_\_\_\_\_ \$ Value: \$700,000.00

b. Company: Genentech \_\_\_\_\_ Contact: Steve Girkout

Address: 611 Gateway Blvd, Building 83, South San Francisco, CA 94080

Phone : (650) 438-0731 Email: Girkout@gene.com

Dates of Service: From 1995 to Current \_\_\_\_\_ \$ Value: \$3.0 million

c Company: California State Automobile Assoc. Contact: Rick Reece \_\_\_\_\_

Address: 3055 Oak Road, Walnut Creek, CA 94597

Phone : (925 \_ ) 279-2572 Email: Rick\_Reece@CSAA.com

Dates of Service: Since 2000 \$ Value: \$600000.00

**I certify the accuracy of this information:**

Signed: Dan P. Plute

Title: President

Date: July 27 2015

**RETURN OF THIS PAGE IS REQUIRED**



**ATTACHMENT D-5  
COMMONWEALTH OF VIRGINIA**

**RFP# E194-1922**

**VIRGINIA STATE CORPORATION COMMISSION FORM**

**Virginia State Corporation Commission ("SCC") registration information:**

**The undersigned Offeror:**

\_\_\_ is a corporation or other business entity with the following SCC identification number: \_\_\_\_\_ .

**-OR-**

\_\_\_ is not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust

**-OR-**

XX is an out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become contracts, and not counting any incidental presence of the Offeror in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the contracts by which such goods were sold and shipped into Virginia from Offeror's out-of-state location)

**-OR-**

is an out-of-state business entity that is including with this proposal an opinion of legal counsel which accurately and completely discloses the undersigned Offeror's current contacts with Virginia and describes why those contacts do not constitute the transaction of business in Virginia within the meaning of § 13.1-757 or other similar provisions in Titles 13.1 or 50 of the *Code of Virginia*.

**\*\* NOTE \*\***

Check this box if you have not completed any of the foregoing options, but currently have pending before the SCC an application for authority to transact business in the Commonwealth of Virginia and wish to be considered for a waiver to allow you to submit the SCC identification number after the due date for proposals.\*

**Signature:** \_\_\_\_\_

*Dan P. Plute*

**Name: Dan P. Plute**

(Print)

**Title: President**

**Name of Firm: Material and Contract Services, Inc.**

**Date: July 27, 2015**

\* The Commonwealth reserves the right to determine in its sole discretion whether to allow such a waiver.

**RETURN OF THIS PAGE IS REQUIRED**

**ATTACHMENT D-6  
COMMONWEALTH OF VIRGINIA**

**RFP# E194-1922**

**Small Business Subcontracting Plan**

It is the goal of the Commonwealth that over 42% of its purchases be made from small businesses. All potential bidders are required to submit a Small Business Subcontracting Plan.

**Small Business:** "Small business (including micro)" means a business which holds a certification as such by the Virginia Department of Small Business and Supplier Diversity (DSBSD) on the due date for bids. This shall also include DSBSD-certified women- and minority-owned businesses when they also hold a DSBSD certification as a small business on the bid due date. Currently, DSBSD offers small business certification and micro business designation to firms that qualify under the definitions below.

Certification applications are available through DSBSD online at [www.DSBSD.virginia.gov](http://www.DSBSD.virginia.gov) (Customer Service).

**Bidder Name:** Maternal and Contract Services, Inc  
**Preparer Name:** Dan P. Rute **Date:** 7/27/15

**Instructions**

- A. If you are certified by the DSBSD as a micro/small business, complete only Section A of this form. This includes DSBSD-certified women-owned and minority-owned businesses when they have also received DSBSD small business certification.
- B. If you are not a DSBSD-certified small business, complete Section B of this form. For the bid to be considered and the bidder to be declared responsive, the bidder shall identify the portions of the contract that will be subcontracted to DSBSD-certified small business for the initial contract period in relation to the bidder's total price for the initial contract period. in Section B.

**Section A**

If your firm is certified by the DSBSD provide your certification number and the date of certification.

Certification number:

Certification Date:

**RETURN OF THIS PAGE IS REQUIRED**

## Section B

Populate the table below to show your firm's plans for utilization of DSBSD-certified small businesses in the performance of this contract for the initial contract period in relation to the bidder's total price for the initial contract period. Certified small businesses include but are not limited to DSBSD-certified women-owned and minority-owned businesses that have also received the DSBSD small business certification. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc. It is important to note that these proposed participation will be incorporated into the subsequent contract and will be a requirement of the contract. Failure to obtain the proposed participation percentages may result in breach of the contract.

**B. Plans for Utilization of DSBSD-Certified Small Businesses for this Procurement**

Micro/Small Business Name & Address  DSBSD Certificate #	Status if Micro/Small Business is also: Women (W), Minority (M)	Contact Person, Telephone & Email	Type of Goods and/or Services	Planned Involvement During Initial Period of the Contract	Planned Contract Dollars During Initial Period of the Contract (\$ or %)
<b>Totals \$</b>					





# **Material and Contract Services, Inc.**

## **PROPOSAL REPLY**

COMMONWEALTH of VIRGINIA



## **RESUMES**

**July 26, 2015**

**Dan P. Plute, President**  
**Material and Contract Services, Inc.**  
**[www.macservices.us](http://www.macservices.us)**

Dan is a graduate from the University of Montana's School of Business with a Bachelor Degree in Finance. His educational background includes graduate MBA course work at the University of New Mexico, University of Montana, and Golden Gate Universities. Following graduation, Dan accepted a position with The Anaconda Company. His early career with Anaconda included positions in the Data Processing, Maintenance, Warehouse, and Procurement Departments. Dan joined a team of Anaconda's professionals and Arthur Anderson's consultants with the mission of designing and installing a corporate-wide IT system for Operations, Accounting, Finance, Maintenance, Purchasing, and Warehousing Departments. Dan moved to Anaconda's Western Regional Division located in Tucson, Arizona in 1972. Following Anaconda in 1974, Dan joined United Nuclear Corporation in Albuquerque, New Mexico as a program manager with responsibilities for purchasing, warehousing, and later as a program manager for United Nuclear's new concentrator, located near Gallup, New Mexico, where Bechtel was the engineering /construction company for the mill project.

Dan joined Bechtel Corporation's Civil and Minerals Division in San Francisco as a program/project manager in 1978. Dan's career with Bechtel took him to Australia, Spain, Canada, Indonesia, Singapore, New Zealand, New Guinea, England, South Africa, Chile, China, Columbia, and Trinidad and Tobago. His experience at Bechtel included projects in mining, airports, power plants, lumber and paper mills, refineries, pipeline construction and mass transit systems. Dan's experience at Bechtel included coordinating and managing projects funded by Development Banks, such as the World Bank and Asian Development Bank. The banks funded infrastructure projects in developing countries. Dan's involvement in the projects included coordinating project events, and budgets, as well as managing projects' cash flow and linking projects' events with host country governments in Indonesia, South Africa, Spain, and New Zealand. This experience included working with Global projects and the need to establish leadership roles working with host country nationals and expatriates, along with managing foreign currency and US dollar payments. His knowledge included skills for managing and structuring agreements, protecting Bechtel's projects through currency exchanges, besides sending Bechtel project personnel to a foreign location and returning the expats to the US. The foreign currency programs included future buying of the foreign currency, in some cases, to protect a US dollar.

In 1988, Bechtel Investments hired Dan and three other program managers to direct and manage a Bechtel Investment purchase of a bankrupt lime stone quarry, located in Columbia, Ca. Dan spent approximately one year on this project.

In late 1988, Dan decided to form his own company to provide project support and consulting services to private entities and government agencies. The company, Procurement Services Associates, provided maintenance, procurement, training, contract management and inventory management services. In 2003, Dan created a second company, Material and Contract Services. MACS' mission is to provide project/construction management, staff augmentation services, strategic sourcing, training, contract



management and global purchasing of commodities, services, and equipment. Dan has successfully managed a small staff augmentation and professional services company for over 20 years.

Dan's recent international travels included trips to Pakistan, South Sudan, Kenya, the Democratic Republic of the Congo, UAE, South Africa, England, France and Turkey. MACS' locations include Pleasanton, San Diego and Santa Ana, CA, Phoenix, AZ and Houston, TX. Dan is a former Executive Advisory Board Member of the National Contract Management Association and an Advisory Delegate on San Jose State University's Industrial Engineering Department.

Dan has managed staff augmentation, outsourcing, and project support projects with domestic and international clients. The support services include managing offshore sourcing and purchasing programs for clients in Iraq, Russia, Turkey, Kenya, and Democratic Republic of Congo. Dan also managed an outsource purchase project for Kaiser Permanente.

## ***Steven M<sup>c</sup>Credie, CPPB***

144 El Camino Ave., Sacramento, CA 95815 (916) 425-8949, [smccredie@hotmail.com](mailto:smccredie@hotmail.com)

Personal webpage and career portfolio - <http://www.beyond.com/StevenMcCredie-CA>

***A Purchasing/Supply Chain Professional Who Will Dramatically Improve Your Bottom-Line***

### **More than 20 Years Experience - Educational Event Coordination (ISM)**

Provided instructors, attracted attendees, arranged for food, meeting location, A/V equipment, workbooks, and payment to instructors/food service/printers. Certified instructional content for CEH credits applicable to ISM, NIGP, NCMA and APICS.

- Arranged and successfully managed 2 National Materials Management Conferences with more than 250 attendees each
- Arranged and managed 12 or more seminars and professional development events per year since 1991

**Recent Project: RFP/Contract Creation and Project Management for Meals on Wheels January, 2015 - Present, Project Value: \$6 Million (completed July 6, 2015)**

### **Government Experience**

**County of Placer, Procurement Services Division, Auburn**

2/1997 to 2/2007

**Title:** Buyer II

- Developed corporate program and standardized procedures for leasing, renting or purchasing fleet vehicles. This resulted in \$1,000,000 savings in the first 3 years and reduced acquisition time from 3 months to no more than 2 weeks.
- Championed cooperative and piggy-back contracting throughout the region
- Assisted in the development of procurement system curricula for County staff training
- Major system and documentation reviews and compliance updates
- Standardized RFP/IFB templates, Updated related policies and procedures
- Streamlined major grant funding processes cutting total acquisition time by more than 50%
- Major inventory redesign - reduced on-site auto parts inventory space by 80% while decreasing delivery time to no more than 1/2 hour

**County of Orange - Purchasing Department, Santa Ana**

10/1984 to 4/1991

**Title:** Buyer I

- Systematized & standardized supplier data base and files of over 10,000 entries into workable tools.
- Negotiated ongoing contracts with Fruit of the Loom and Levi Strauss resulting in 40% overall savings on an annual spend of \$750,000.
- Project Procurement lead for multi-year court filing system digitization project.

### **Private Industry Experience**

**Balanced Body, Inc. Sacramento**

4/2010 to 4/2014

**Title:** Senior Buyer

- Green and Sustainability Project Lead - Increased land-fill diversion rate from 65% to 95%
- Streamlined KanBan system, increasing efficiencies by 30%

**Bio-Rad Laboratories, Hercules**

9/2009 to 12/2009

**Title:** Buyer/Expeditor (Contractor through MACS)

<b>Material and Contract Services (MACS), Sacramento</b>	1/2008 to 4/2009
<b>Title:</b> Sacramento Area Manager	
<b>Calpine Corporation, Clearlake</b>	8/2007 to 3/2008
<b>Title:</b> Contracts Specialist (Contractor through MACS)	
• Established detailed procedures & master check list for contract administration & budgeting which virtually eliminated contract and budgeting mistakes.	
<b>Advanced Materials Management Associates, Sacramento</b>	1/1996 to 2/1997
<b>Title:</b> Partner	
<b>Trailer Haul Concrete Systems, Sacramento</b>	5/1995 to 9/1995
<b>Title:</b> Purchasing/Logistics Agent	
<b>Airco (BOC) Coating Technologies, Fairfield</b>	10/1994 to 4/1995
<b>Title:</b> Buyer/Planner (Contractor through MACS)	
<b>Pride Electronics, Rocklin</b>	6/1994 to 9/1994
<b>Title:</b> Buyer/Planner	
<b>Hewlett-Packard Company, Roseville</b>	3/1993 to 3/1994
<b>Title:</b> Procurement Coordinator	
<b>Sacramento Lighting, Sacramento</b>	1/1992 to 10/1992
<b>Title:</b> Purchasing Manager	
<b>Jelly Belly Candy Company, Fairfield</b>	8/1991 to 12/1991
<b>Title:</b> Purchasing Coordinator	

### **Volunteer Experience**

Institute for Supply Management - Sacramento Valley	7/2010 to Present
<b>Title:</b> President	
Institute for Supply Management - Sacramento Valley	7/2007 to Present
<b>Title:</b> Director of Education	
National Association of Purchasing Management - Sacramento Valley	7/1994 to 6/1997
<b>Title:</b> President	
National Association of Purchasing Management - Sacramento Valley	7/1991 to 6/1994
<b>Title:</b> Director of Education	

### **Education**

*Complete listing of over 20 years of Continuing Education courses available upon request*

B.A. Music & History - Vanguard University of Southern California

A.A. Purchasing Management - Fullerton College

**Publications** - [http://ezinearticles.com/?expert=Steven\\_McCredie](http://ezinearticles.com/?expert=Steven_McCredie)

### **Professional Affiliations/Certifications**

President – Institute for Supply Management-Sacramento Valley (8 years)  
 Director of Education - Institute for Supply Management-Sacramento Valley (11 years)  
 Member – National Institute of Governmental Purchasing (17 years)  
 Certification as a Certified Professional Public Buyer (15 years)

## **TRAINER BIOS**

### **Michael Bohon, CPSM, C.P.M., CMRP**

Michael Bohon is the Founding Principal of the HealthCare Solutions Bureau (HCSB), a healthcare supply chain consulting firm and speakers' bureau. His extensive business background covers work in materials, operations, sales, and administration in three industries (steel, electronics, and specialty manufacturing) with the last 27 years in healthcare supply chain management. Prior to founding HCSB, Bohon held positions as Director, Supply Chain Management at TMC HealthCare and Director of Purchasing and Contracts at Health Partners of Arizona. He also worked as a consultant independently and for Perigon, LLC and Solutions. Among his accomplishments in consulting are the supply cost reduction of \$6M+ in physician preference items at hospital systems nationally and leading successful facilities planning and design projects at expanding hospitals. Bohon has served as a member of the VHA Contracting Services Advisory Council and was the national chairperson of the Novation Materials Leadership Council and the Dun & Bradstreet Software Healthcare Group. He was the co-founder and national chairperson of the Healthcare Business Professionals Association. He has also served as the chairperson of the VHA West Coast Materials Network. He is a frequent speaker at national meetings and conferences. His articles on materials, negotiations, management, e-commerce, and other subjects have appeared in numerous national publications. Bohon has also provided consulting services to major healthcare corporations such as Johnson & Johnson and Becton Dickinson. Recently Bohon has provided on-site negotiation training for clients such as CU Health System, Froedtert Health, Resurrection Health, and North Kansas City Hospital among others and assisted AHRMM in the development of on-line courses and podcasts on negotiation. He has also presented multiple lecture series for hospital personnel through their group purchasing organizations. Bohon is an instructor for the Institute for Supply Management (ISM). He has developed business and supply management courses for ISM, Accenture's Supply Chain Academy, and the University of Arizona. These include public seminar courses and two on-line negotiation courses. ISM has published his work in a self-study book, "Power Negotiations – Unlock Your Powers of Influence and Persuasion." Bohon graduated from the State University of New York, Buffalo.

### **Julie Brignac, C.P.M., Six Sigma Black Belt**

Julie Brignac has worked as a transformational leader in procurement, supply chain, operations, and quality for globally matrixed organizations, and has over 20 years of strategic and operational experience in supply chain management, international outsourcing, sales and operational planning, procurement transformations and business process improvement initiatives. Julie began her career at E.I. du Pont, assuming responsibilities in Supply Chain Operations and Project Management at five key manufacturing sites throughout the United States, while engaging as a member of the field program for Finance professionals. Over the next ten years, Julie took on roles with increasing leadership responsibility in the areas of Supply Chain Management, Quality and Lean Six Sigma, Operations, Sales, Finance, and Procurement. Julie's experience also includes launching and leading a boutique consultancy, QuantumSix Solutions, Inc. Her work there focused on the design and implementation of supply chain and business process improvement solutions to help companies sustain efficient operations and drive significant savings. She is the inventor of The RoSS Model®, an end-to-end project benefit financial validation process that helps organizations predict, report, and reconcile project benefits to financial statements, specifically in the supply chain arena. Julie successfully merged QuantumSix with Boston-based Vantage Partners in late 2013, and held the position of Principal at Vantage in their sourcing and supply chain management practice. Julie is a certified instructor for specific methodologies, such as the Herrmann Brain Dominance Theory, Project

Management, Supply Chain Management, and all levels of Lean Six Sigma. She is certified as an Associate Adjunct Professor for the Undergraduate School of Supply Chain Management at the University of Maryland, as well as an Adjunct Professor of Online Learning for the Whitman Business School for Syracuse University. Julie has also worked with the University of Tulsa's business school to support local companies in their continuing education efforts in both the Supply Chain and Lean Six Sigma arenas. Julie holds an undergraduate degree from the University of Virginia, where she was a Bailey Tiffany Scholar, and obtained a graduate degree in Business Administration and International Business from the University of Maryland University CShe is a certified Six Sigma Master Black Belt, Lean Expert.

**Martin J. Carrara, JD, Esq.**

Martin is a commercial and transactions legal counsel with substantial experience negotiating and drafting complex agreements for a broad range of domestic and international business, commercial, technology and real estate transactions, with an emphasis on procurement and supply agreements of virtually every nature. He has significant experience in leading companies in the pharmaceutical, consumer healthcare, financial services, communications, and construction industries. He is currently Senior Corporate Counsel at Pfizer Inc. His representative transactions include all aspects of supply including contract manufacturing, direct material supply, and distribution; software licensing and other information technology agreements; outsourcing agreements; advertising and promotion agreements including agency, celebrity spokespersons, joint promotions, product placement and network integrations, and music and other license agreements; construction and capital equipment; and consulting and professional and other services. Mr. Carrara's practice also includes negotiating and drafting agreements for business development, strategic collaborations, sales and marketing, facility divestitures and acquisitions, and research, joint development, and clinical study agreements.

As a frequent author and contributor to procurement and supply legal issues, Mr. Carrara is author of the Institute for Supply Management (ISM) Contract Development and Administration Workbook; he is co-author of the Legal Aspects of Purchasing chapter in The Purchasing Handbook and co-author of the ISM a Legal Primer: What Every Purchaser Should Know. He is a member of the Board of Directors of the New Jersey Corporate Counsel Association (NACKA), and he is the Chair of the NACKA Commercial Law Committee. He is a past recipient of ISM – New York's "J. H. Leonard" award. Mr. Carrara is a lifetime C.P.M., and he holds a J.D. from Fordham University School of Law and MBA and BS degrees from Wagner College. He is a member of the Bar of the Supreme Court of the United States.

**Richard L. Dawe, PhD**

For Golden Gate University, Richard is Director of the Operations and Supply Chain Management Program and the Center of Operations Management excellence that promotes student, faculty, alumni, and industry collaboration in this field. He has taught undergraduate, graduate, and doctoral supply chain and operations courses at GGU since 1995. Richard has extensive supply chain management and industrial marketing experience from a 30 year career in the chemical, food, forest, retail, electronics, and logistics industries both in management and as a consultant. Companies he worked with includes: US Air Force, Colgate-Palmolive, US Borax, Southern Pacific, Ernst & Young, Intel, Samsung, Fritz Co., HP, Georgia Pacific, National Semi-conducteur, Unisys, IBM, Cisco Systems, and Lucent. Dr. Dawe has published articles, cases, research papers, referred journals, and a book. He has presented at many conferences and is actively involved with numerous professional organizations as a member or officer including APICS, Council of Supply Chain Management Professionals, Institute for Supply Management, and the Biotech Supply Management Alliance. He has taught APICS professional

seminars for local companies including Bio Rad, Genentech, Ghirardelli, Lawrence Berkeley National Lab, Form Factor, and Clif Bar. He also teaches a global supply chain management course for the UC Berkeley Extended Education program.

### **Tom DePaoli, PhD**

Tom is the Management Program Director at Marian University in Fond du Lac Wisconsin and the Principal of Apollo Solutions, which does general business consulting in the human resources, supply chain, and lean six sigma areas. Recently he retired as a Captain from the Navy Reserve after over 30 years of service. In other civilian careers, he was a supply chain and human resources executive with corporate purchasing turnaround experience and lean six sigma deployments. Tom has worked for over ten major companies and consulted for over fifty organizations. Some of his consulting projects included: information systems projects, re-engineering organizations, transformation, e-procurement, e-commerce, change management, global sourcing, and negotiating. His industry experience is in the chemical, paper, pharmaceutical, IT, automotive, government, consumer, equipment, services, and consulting industries. He has been published extensively in journals, magazines, and books. He has been involved in many forms of communications including website design, marketing campaigns, political campaigns, radio advertisements, and scripts. He is the author of seven books. His Amazon author's page is <https://www.amazon.com/author/tomdepaoli>

### **Yasser Dessouky, PhD**

Yasser Dessouky has extensive research and consulting experience in developing models to analyze improvements in the design and efficiency of systems and work flow patterns. He has gained recognition in the areas of simulation modeling and analysis, and quality management, including lean six sigma and integrated supply chain management. His work in supply chain management includes developing models to optimize inventories in the supply network. Dr. Dessouky has more than 30 publications and grants in excess of \$750k in these research areas. He also serves as an associate editor for an international journal, Computers and Industrial Engineering, and as an editorial board member on several other prestigious international journals. His professional practice includes work with organizations such as Applied Materials, Texas Instruments, General Electric, Ford Motor Company, TRW Inc., United Parcel Service, and Desert Samaritan Hospital. Prior to joining the faculty at San José State University in 1997, Dessouky served on the faculty at Miami University, Ohio. He earned his doctorate and master's degrees in industrial and management systems engineering from Arizona State University and a bachelor's in industrial engineering from the University of Wisconsin-Madison.

### **Ron Emery, C.P.M.**

Ron Emery is a seasoned operations, global sourcing, and supply chain professional. His focus is on developing strategies to support business growth and cost efficiencies in a wide variety of industries. He currently serves as Director of Manufacturing and Materials for Process Technology Corporation in Mentor, Ohio and runs his own operational consulting practice. Ron has led several projects focused on improving operational efficiencies for many clients. Ron has a tremendous passion for operational improvement and enhancing customer relationships. Ron worked with several large international organizations helping to identify areas for cost savings related to sourcing, procurement, logistics, distribution, and operational improvement. He has achieved on average 20% - 45% cost reductions on major commodities and is proficient in developing global sourcing strategies while minimizing operational risks. Ron has worked closely with companies on process improvement around material flow dealing with excess material and material management. He has served as a materials delivery manager with one of his major clients and has increased production from 60 to over 650 units per day by

reducing bottlenecks and improving flow of materials to and from the production lines. Ron has developed training materials to change internal cultures and instill new progressive management values within an organization. Ron received his BA, Business, and Economics from Hiram College in Hiram, OH and his MA, Materials Management from Antioch University in Yellow Springs, OH. He regularly speaks at APICS/ISM events and has written his first book entitled, *"The Dysfunctional Organization-why we will never be competitive in America again."* His second book entitled *"Growing Comes from Planting Seeds—A guide to mentoring, coaching and developing business relationships"* will be published July 2015.

### **Eldonna Fernandez**

Eldonna is a retired Air Force veteran who was deployed to the Middle East after 911 with over 30 years of leadership, contracts management, and negotiation experience. She has negotiated contracts over \$100 million globally. She is a subject matter expert in the Contracting Career Field and has developed/taught courses on Contract Claims, Negotiation and other aspects of Contracting. She was recently featured on Fox Business and has 7 years of extensive experience working for defense contractors in the Aerospace Industry. She holds a Top Secret security clearance and has been a trusted agent of the U.S. Government for 30 years. Eldonna is the CEO of Dynamic Vision International Inc, a training and consulting firm. She specializes in training people how to think like a negotiator by creating win-win results and understanding the pitfalls to avoid. She is an international award winning speaker and author. She is author of *Think Like A Negotiator: 50 Ways to Create Win-Win Results by Understanding the Pitfalls to Avoid*. She is also author of the GoPINK Rules of Engagement 5 Foundational Principles for Taking Control of the Handlebars of Your Life. She is co-author of the award winning *Heart of a Military Woman* which is a compilation of stories by, for, and about military women, and is also a contributing author in *Heart of a Woman in Business*, *Heart of a Toastmaster*, *Wake Up Women and Motorcycle Diaries A to Z*. She is a certified Level III in the Acquisition Professional Development Program in Contracts and certified in Neuro Linguistic Programming (NLP), as well as a Certified Coach and Consultant.

### **Henry F. Garcia, C.P.M., CPSM**

Mr. Garcia joined the Southwest Research Institute® (SwRI) early in his career, following a brief employment with Dun & Bradstreet, Inc. Beginning with clerical positions in Shipping and Receiving and Accounting, he was promoted quickly as a Buyer into Purchasing. This was eventually followed by promotions to Assistant Manager to Department Manager of Purchasing. As an integrated project initiative, he later founded the Materials Management department, and, as Director, he incorporated the Shipping and Receiving, Inventory/Stores, Traffic, Mail Services, Risk Management, Corporate Travel and Food Services while retaining Purchasing as another section of this department. Mr. Garcia is an experienced university instructor and a veteran trainer in various areas of purchasing and supply management as well as finance and project management-related subjects. He has taught Economics, Finance, Procurement, and Budgeting courses at the graduate and undergraduate levels for several colleges and universities. He has taught seminars and workshops on behalf of professional societies at various universities and other sites in the United States, Mexico, and Puerto Rico. He has made several presentations at professional society seminars, workshops, conferences, and symposia, and contributed to the proceedings of the Institute for Supply Management's International Supply Management Conferences and the Project Management Institute's North American Congress. In addition, he has authored several articles in his areas of expertise related to purchasing and supply management for regional and national publications, and is a contributing author for *The Purchasing Handbook*, 7th Edition and the Practice Standard for Earned Value Management. In addition, Mr. Garcia is a regular instructor for the Alamo Chapter of the Project Management Institute (PMI) in their education and

Project Management Professional (PMP) preparation training programs. He also has taught project management seminars for Webster University. Mr. Garcia is an adjunct professor at Webster University and has been an adjunct professor at San Antonio College, St. Mary's University and University of Texas at San Antonio. At Webster, his primary emphasis is Procurement and Acquisition, and at the others, his chief focus has been Economics. After his retirement from SwRI in 2003, Mr. Garcia founded Asentrene, Inc.®, a minority-owned consulting and training firm specializing in Project Management, Supply Management, and Operations Management.

### **Marilyn Gettinger, C.P.M., CPSM**

Marilyn Gettinger owns and manages the consulting firm, New Directions Consulting Group. Marilyn created the organization in 1993 with the mission to assist organizations in making the most of their precious resources. She designs customized training programs and consulting services to support organizations that must change to meet the demands of the 21st century. Her workshops present theory and then relate that theory to meeting the challenges of the organization. Participants are encouraged to take on intra-organizational projects that address upgrading and reengineering of existing business and manufacturing processes. Her consulting services offer a team approach to streamlining existing processes using all of the skills and experiences of staff members. She has consulted with organizations to improve purchasing, inventory, and supply chain processes. Ms. Gettinger is program coordinator and instructor *for the Middlesex County College Supply Chain certificate program, has chaired, and instructed the Project Management Certificate program* at Union County College. She teaches TQM and SCM for IONA College and a materials management certificate series at Worwic College. She teaches the Institute for Supply Management Certificate preparation courses at Raritan Valley and Middlesex Community Colleges and also on site at company locations. She has been a presenter at the Institute for Supply Management International Conferences in 1998 through 2011. She has presented workshops at the American Production and Inventory Control Society's International Conference in 2000, 2002, 2003, 2009, 2011, 2012, 2013, and 2014.

### **Omid Ghamami**

Omid Ghamami has 18 years' experience with Intel Corp, holding responsibility for \$1B + in annual expenditures as a purchasing executive, and also managing Intel's global purchasing operations. He was also responsible for the end to end negotiation planning, execution, and training processes for the entire \$16B global procurement organization. Intel named him "The Godfather of Negotiation Planning." Since 1995, Omid has provided consulting, training, and executive coaching for thousands of procurement executives and professionals from 19 different countries and 5 continents on topics related to the entire spectrum of purchasing, supply chain management, purchasing contract law, public procurement best practices, negotiations, and supplier management. Omid has published a multitude of articles in global purchasing journals, is the author of two bestselling purchasing books, and has 50+ hours of TV appearances as a purchasing industry expert. He is also the founder, chief architect, and exclusive Adjunct Professor of Purchasing for the only purchasing curriculum and certificate program in the entire California State Community College System. Omid holds a Bachelor's degree in Business Administration from California State University Sacramento and a Master's Degree in Business Administration from the University of California, where he was voted Class President.

### **LeRoy H. Graw**

EdD, CPSM, CPP, CPPM, C.P.M., CPCM, CISC, CIPP, CIPTC

Dr. LeRoy H. Graw is a multi-certified, broad-based, action-oriented leader with sophisticated skills inventory in a variety of related disciplines. Multi-track (Practitioner, Consultant, and Educator) experience in a variety of organizational settings in both the public and private sectors, domestically and



abroad. Broad base of experience in business systems and wide exposure to enterprise-wide business management/financial systems in the public and private sectors. Strong technical and computer skills, including experience teaching online. Graduate educational credentials in finance, accounting, education, and management and more than 40 years of university instructional and leadership experience, in a broad range of procurement and supply chain subjects. Textbook author (Cost/Price Analysis, Service Purchasing, and International Negotiation) and internationally recognized speaker and lecturer. Trained thousands of procurement and supply chain students in the US, China, Malaysia, Singapore, Thailand, Indonesia, South Africa, Korea, United Arab Emirates, Saudi Arabia, Mexico, and Japan. Unparalleled expertise in Procurement and Supply Chain Management.

#### **Mark Grieco, JD**

Mark Grieco is an attorney, a member of the Florida Bar, and senior partner at Grieco & Scalera, PA, a firm specializing in contracts, software, corporate, real estate, trusts and estates, family law, intellectual property and insurance litigation. In addition to his law practice Mr. Grieco is a world-wide lecturer in the field of contract law, legal negotiations, software agreements and purchasing. He has been an educator for the Institute for Supply Management for over 15 years. He has taught business professionals for such diverse companies as Disney, FP&L, Holcim, Sony, Kodak, Oracle, Coca Cola, and GE. He also works with companies to standardize contracts and teaches in-house courses. Mr. Grieco has an undergraduate degree in business and an MBA from Texas Tech University and a Juris Doctor degree from Quinnipiac University. He has published two books. One on divorce called Divorce: a four letter word and another book on contracts called Purchasing, Contract Law, UCC & Patents. He is working on his third book and has just finished a course covering over 170 contract terms and conditions. He also works with companies to standardize contracts and teaches customized in-house courses.

#### **Jim Haining, CPSM, CPSD, C.P.M., A.P.P., MBA**

Jim has over 27 years' experience in Supply Management in both public and private sector organizations. He is employed by Clark County Nevada in Las Vegas, Nevada. Former employers include Sierra Pacific Power Company, and Sprint. Jim has been a workshop presenter for several years at the ISM International Supply Management Conference, ISM Southwest Forum's Supply Management Conference, and ISM's Services Conference. Jim received his BS from Brigham Young University and MBA from the University of Phoenix. Jim was one of the first supply management professionals to receive ISM's Certified Professional in Supply Management and Certified Professional in Supplier Diversity designations. He holds a Lifetime C.P.M. and A.P.P. designation. Jim has been very involved in ISM and its affiliates since 1989. Jim has served on ISM Affiliate Support Council, and ISM Board of Directors.

#### **Ken Jones, CPSM, C.P.M., Six Sigma Black Belt**

Ken Jones is integrated supply management faculty and the Director of Educational and Applied Solutions at Western Michigan University's Center for Integrated Supply Management -- recently ranked #5 in the nation by The Gartner Group's survey of top undergraduate supply chain management programs in 2014. In this capacity, Ken teaches purchasing, and lean-six sigma, and develops and manages the *Bronco Force Initiatives* currently consisting of: university supply chain consulting teams, open enrollment and customized training solutions, fast-track industry certifications, and K-12/community college outreach programs. Before shifting his focus to the education field, Ken was a supply chain management professional with 15 years of progressive supply chain leadership experience at Ford Motor Company, Rolls-Royce Aerospace, Roche Pharmaceuticals, and Hillenbrand Industries.

### **Michael J. Kolodisner, CPPO**

**Michael J. Kolodisner** is currently President of Pro-Train, a training and consulting company located in Laguna Hills, California. Mike has won numerous awards including seven Excellence in Purchasing awards, two Distinguished Service Awards, and an Outstanding Agency Accreditation Award. Prior to his current position, he was the Chief Purchasing and Contracting Officer for the Metropolitan Water District of Southern California, the largest water in agency in the United States. Before that he was Director of Administrative Services and Chief Purchasing Officer for Orange County, California. Mike has done training and consulting for both Fortune 500 Companies and Public Organizations throughout the United States, Canada, Europe, Asia and South America. Mike has a BA from the University of Maryland and has attended graduate school at George Washington University.

### **Andrew Kwok, CPSM, CPSD, CPIM, CSCP**

Andrew is manager, strategic sourcing at Eaton Corporation. Eaton is a global technology leader in power management solutions that make electrical, hydraulic and mechanical power operate more efficiently, reliably, safely and sustainably. His over 15 years of supply chain professional experience includes global strategic sourcing, supplier development, category management, supplier risk management, procurement, new product introduction, project management and team building. He holds a Bachelor's degree in Mechanical Engineering from Nanyang Technological University, Singapore and an MBA in Operations and Finance from Moore Business School, University of South Carolina. Andrew is certified in Production and Inventory Management (CPIM), Certified Supply Chain Professional (CSCP), Certified Professional in Supply Management (CPSM) and Certified Professional in Supplier Diversity (CPSD). He currently serves on the board of director of ISM West Georgia and is the current President for the last 5 years.

### **Timothy H. Leh, CPSM**

Tim is Director of Global Strategic Sourcing at the Hershey Company with a current focus in Global Real Estate and Construction Procurement and brings over 33 years of supply chain management experience to this profession. Prior to this, he was responsible for all global capital equipment acquisitions totaling approximately \$300 million dollars in spend with expertise in global sourcing and solid experience using various purchasing tools such as spend analytics, supply portals, e-auctions, and e-RFP solutions to identify spend activity and apply strategic procurement techniques. His strong interpersonal skills have helped him drive strategic initiatives throughout the organization both internally and externally. In addition to his work experience, he has been involved with educating many professionals in supply management using real world experience and different techniques for companies to become world class in the field of business and supply management. He has developed the entire training content along with the teaching strategies for certification and procurement programs at well-known companies throughout the US, such as, Johnson & Johnson, BAE Defense Systems, and Harley Davidson. Tim helps candidates successfully pass the certification exams and has taught several certification programs at the university level. His primary focus is to transfer his work experience and educational background to enhance companies supply chain as well as educate individuals to become certified practitioners in supply management. He emphasizes critical thinking, collaboration, teaming, and strong communication skills. His grass roots experience has grounded him with experience that is not only valuable but provide real business cases when teaching others and for his students to apply their learnings to improve one's own organization bottom line. His strong desire to give back personally to the professional along with his knowledge transfer to others is a rewarding experience to assist others in their educational process to become supply professionals is truly a rewarding experience. He holds a

Masters in Business Administration from Lebanon Valley College, Annville, PA and is an active member in several organizations such as the Institute for Supply Management.

### **Elizabeth Lions**

Elizabeth studied psychology at the University of Maine. She is the Author of two books, 'Recession Proof Yourself' and "I Quit! Working for You Isn't Working For Me." She is currently crafting her third book on leadership. Elizabeth's coaching practice is broken into two key areas: career management and leadership. Her credentials include being quoted in U.S. World News Report, AOL Jobs, Australian Finance, Silicon India, CBS Money Watch, Yahoo, The Ladders and Dice job boards, the front page of the Philadelphia Tribune, PBS, CBS Money Watch, Dale Carnegie and John Tesh's blog. In 2013, her radio show for women entitled, "Leadership Lessons from the Lioness," was created through Plaid For Women, along with her articles. Elizabeth's client list includes executives from Fiserv, AT&T, Microsoft, Wells Fargo, eBay and Intel to name a few. Today, Elizabeth can be found writing, coaching and collaborating with the who's who of Corporate America, as well as abroad.

### **Patrick Lynch, CPSM, C.P.M., CFPIM, CSCP, CQA, SSGB**

Patrick Lynch has pioneered significant program advancements in Lean Replenishment, Supply Chain Risk Mitigation and Operations. He has excellent skills in leading all supply perspectives of supplier relationship management, including ERP, Cost Control and Quality Auditing. As a practitioner in medical device manufacturing, Patrick has developed streamlined strategic supply advancements resulting in >50% lead-time and risk reductions during medical device development and commercial roll-out, and thereby helping to avoid extra rounds of funding. With his background in Toyota Production Systems, he has been able to drive double-digit improvements in cost and efficiency during product maturity phases. He emphasizes these experiences and incorporate the key principles into much of his course instruction. Patrick has applied his knowledge of Production Planning, Strategic Sourcing, Quality Systems, Lean Manufacturing, Supply Chain Risk and New Product Development in several publications as well as develop course materials, keynote addresses and workshops on these topics. Since obtaining numerous professional certifications and a BA degree in Materials Management from Michigan State University, he has continually given back to the industry by leading courses for APICS and by hosting workshops and professional dinner meetings for AME, APICS and ISM. During his career as a practitioner he has worked in various supply chain roles in General Motors, Abbott Labs, Toro, Callaway Golf and multiple new device start-up companies.

### **Irene Marnell, CPSM, CPSD, CPCM, PLS**

Irene Marnell has over 20 years experience in procurement and vendor management. She has held various leadership positions in procurement and vendor management at NRECA, AmerisourceBergen, Wyeth Pharmaceuticals, Lucent Technologies, and AT&T. She has been responsible for up to \$4B in procurement contracting and has managed both direct and indirect sourcing, contracting, and supplier management. Among her other awards and achievements, Irene was a member of Lucent's Supply Chain organization that received the Medal of Excellence from Purchasing Magazine, and she was part of the AT&T division that won the Malcolm Baldrige National Quality Award. She has a degree in Education from Marshall University and a Masters Certificate in Supply Chain Management and Logistics from Penn State. She is known as an energetic speaker and has taught at venues large and small.

### **Michael Matalone**

With over two decades of experience as a successful entrepreneur and human capital management consultant, Michael Matalone has authored dozens of articles on the importance of having the right

people in the right roles as a fundamental driver of business growth and profitability. Michael has spent the last 12 years, studying, developing and implementing an objective, scientific, and methodical process and suite of tools to help companies assess, hire, manage, develop and retain top talent called The XP3 Talent System™. An award-winning speaker, Michael has delivered more than 300 workshops and presentations to business groups throughout the US, Canada and the U.K. Michael spent five years as an executive coach and facilitator for Vistage International, the world's largest CEO membership organization, and was the founder and CEO of three other companies. He is currently at work on a new book based on his popular workshop presentation, "The Talent Gap – People Potential Profits.

### **Darin Matthews, CPSM, CPPO, C.P.M.**

Darin currently serves as director of contracting and procurement for Portland State University. His role for the state's largest university includes oversight of procurement, contracting, and capital construction. He has over twenty years of management experience in state and local government, as well as private industry. He is a past-president of the Oregon Public Purchasing Association and a former board member for the Institute for Supply Management. Darin speaks throughout the world on a variety of procurement topics, and his writings have been featured in Purchasing Today, The Public Manager and The Journal of Public Procurement. He is a national columnist for American City and County and his books include Warehousing and Inventory Control, Logistics and Transportation, and Effective Supply Management Performance. He has lectured at numerous universities throughout North America and serves on the faculty of Portland State University, School of Business Administration. He holds a Bachelor's degree in Business/Political Science and a Master's degree in Acquisition Management. Darin is an instructor for the Institute for Public Procurement and served as their President in 2007. He has also served as a board member of the Universal Public Procurement Certification Council and the Public Procurement Research Center at Florida Atlantic University. In 2012 he was recognized with NIGP's highest honor, the Albert H. Hall Memorial Award. Darin is also a recipient of NIGP's Distinguished Service Award, and the Lewis E. Spangler Award from the International Federation of Purchasing and Supply Management.

### **Zai Phiroz, MBA**

Zai Phiroz is a specialist on marketing and global supply chain practices, within global impact areas including the fast moving consumer goods and IT industry. He has held a number of executive and senior management roles, including Procter & Gamble and TELUS, and currently teaches at Harvard University. In his work at Procter & Gamble, Mr. Phiroz managed many national and international projects in partnership with Wal-Mart, Target, Walgreens and CVS. In charge of both vertical and horizontal lines across a number of billion dollar brands, Mr. Phiroz was responsible for quarterbacking various initiatives leading to a cost savings of over \$120M through the introduction of supply chain optimization initiatives, demand forecasting, and disruptive innovation techniques. As the president at Pier Consulting Group Inc., Mr. Phiroz is responsible for direct collaboration with medium sized corporations and federal charities on sustainability, macro marketing, and management and coordination of all supply-chain and operations projects. Major projects have included management of consumer marketing research, aggregate data analysis on competitive markets, growth opportunity quantification, and optimization of supply chain coordination. Mr. Phiroz is a graduate of the University of Windsor's Computer Science program, and holds an MBA in International Finance. He is regularly invited to guest lecture at various Universities and has spoken at TEDx, OPAL, UN.

### **Greg Pustelnik**

Greg has over 25 years of Logistics, Purchasing, Contracting, and Materials Management experience in

both the Public and Private Sectors. Extensive background in Public Sector pertains to the application of Public Contracting Code and Public Contracting Best Practices. Greg has developed and implemented significant training programs. Furthermore, he has demonstrated the ability to drive significant cost savings through successful design and implementation of strategic sourcing programs and from leading reengineering efforts. He also has a background in managing Logistics Departments with an emphasis to on-going continuous improvement programs (i.e., Procurement Planning, Contract Administration Management Systems). Moreover, Greg has experience in building and improving Procurement Departments (e.g., defining and implementing vision, putting into place performance metrics to measure overall performance). Finally, through extensive integration of technology within purchasing departments he has managed has resulted in enhanced value to these organizations. His Education background includes a Master's Degree in Business Administration. Greg Undergraduate Degree is a BA in Economics.

### **Zinovy Radovilsky**

Extensive experience in teaching and consulting in operations and supply chain management, operations research, and quality management. Designed and developed quantitative models and applications/software and consulted in operations and supply chain management, project management, inventory analysis, quality management, e-commerce management, and enterprise resource planning and management. Major contributions to the Department of Management and College of Business and Economics included: Full responsibility for preparing and editing a chapter on Strategic Management in the AACSB Maintenance Accreditation Report in 2012. Taught graduate and undergraduate courses in operations management, quantitative business methods, enterprise resource planning and management e-commerce management, strategic management, supply chain management, decision analysis and modeling, quality management, forecasting, and econometrics. Taught professional seminars in E-business Supply Chain Management, Computerized Forecasting, and Quality Improvement through the CSUEB Division of Continuing and International Education (DCIE).

### **Eddie Raether**

Eddie Raether is a Change Strategist and sought-after international speaker who has addressed thousands of organizations, associations and Fortune 50 companies on five continents. An authority on people and performance, Eddie has over 35 years of experience in behavioral science and motivation for personal and professional excellence, including employee engagement in the workplace. Her expertise in conflict resolution, influence, negotiations, and innovative thinking is your guarantee for remarkable results. A bestselling author, Eddie's seven inspirational and business books have been published in over a dozen languages. She is also the coauthor of 15 anthologies. Eddie is the creator of I Believe I Can Fly!, the empowering and transformational character building program for children. Having been a college professor, counselor, therapist, and talk show host for affiliates of ABC, Eddie's profound insights and information make her an in-demand resource for all media including The Wall Street Journal, USA Today, the Chicago Tribune, Selling Power, Cosmopolitan, Inc., NBC, ABC, and many others. Eddie is one of 240 women in the world awarded the CSP (Certified Speaking Professional) mark of excellence by the National Speakers Association. Not just a topic or title, Eddie is hired for her uniqueness, energy and essence as reported by SC Johnson, "Eddie, YOU make the difference."

### **Tammy Rimes**

Tammy presents at national and regional procurement conferences, and works with procurement officials across the nation on cooperative procurement opportunities, and identifying areas that may result in cost savings, efficiencies, and value added services and products. She also assists companies in learning how to work with government, and becoming adept at winning government contracts. Formerly serving as Purchasing Agent for the City of San Diego, she purchased over \$1 Billion worth of commodities and services. During the 2007 Witch Creek Fires that destroyed over 2000 homes and the Mt. Soledad landslide in one of San Diego's most exclusive neighborhoods, she served as the Emergency Logistics Chief. Tammy was in charge of centralizing the city's purchasing and warehouse operations and implemented the City's first environmentally preferred purchasing program and moved the surplus property operations to online auctions to increase revenue. Her consolidation efforts of the warehouses resulted in a \$1.4M savings during the first year. Her team won the Achievement in Excellence Award from the National Purchasing Institute each year she was in management. Tammy has a Master's degree in Public Administration.

### **Suzanne Sellers, CPSM, CPSD**

Suzanne is a uniquely skilled and versatile supply management professional offering over a decade of procurement, finance, and consulting experience. She offers a wealth of experience and uses those as a basis for providing insight into some of supply management's most complex issues. Her specialty is Indirect Services Procurement and her responsibilities have included managing \$100,000,000 plus in indirect spend, substantial contracts drafting and negotiations, meeting cost reduction targets, providing spend transparency, and developing and implementing procurement strategies. Ms. Sellers' academic training includes a bachelor's degree in Finance from DePaul University, a Masters of Business Administration in Operations Management and Entrepreneurship also from DePaul, and a Masters degree in Public Policy from the University of Chicago. She is currently studying toward a Master of Divinity degree at Trinity Evangelical Divinity School in Deerfield, IL. She is currently studying toward the Six Sigma Green Belt designation through the Institute for Industrial Engineers. Ms. Sellers has participated on ISM teams at both the local and national levels. Her advocacy of the supply management profession includes efforts to increase the standing of ISM among member corporations by promoting membership benefits and by creating partnerships and alliances with other professional associations in various industries.

### **Joe Shedlawski, CPIM**

Joe Shedlawski has over 35 years of leadership and supply chain experience in the pharmaceuticals, biotech, and consumer packaged goods industries. He has taught APICS Certification classes for nearly 30 years, and is an APICS Master Instructor. Joe directed the Supply Chain functions at Lederle Consumer Healthcare, Wyeth Lederle Vaccines, Wyeth Consumer Healthcare, and CorePharma, LLC. In 2009, Joe became a consultant, coach, and educator, specializing in Supply Chain, Project Management, and Sales and Operations Planning. He is an Adjunct Professor at Misericordia University, Bloomfield College, and Rutgers University, teaching Project Management as well as Operations and Supply Chain Management. Joe participates in Sales and Operations Planning education, training, and coaching. He has been instrumental in the design and implementation of Sales and Operations Planning processes in companies ranging from \$250 Million to \$2.5 Billion in annual sales, with several thousand SKUs. Joe served on the APICS Board of Directors in various capacities for nine years, and was the global President of APICS in 2007. While leading APICS, he oversaw the development of a strategic planning process and implementation of a new governance model to support globalization. An accomplished speaker, he has delivered many seminars and presentations for APICS, IBF, ISM, and other professional organizations, both nationally and internationally. He has authored

several articles in trade publications. Joe instructs Train the Trainer and Learning Dynamics for APICS. Joe holds a B.A. in Biology from Bucknell University and an MBA in Finance from Iona College.

### **Paula Shoup**

Enthusiastic Executive Coach and Facilitator adept at working with business leaders and teams to create extraordinary results. Prior Corporate Executive with over 20 years in large fortune 500 organizations. Leadership, Coaching, Facilitation, and Speaking expertise with businesses across the U.S, Asia, and Europe. Expertise in building strong internal and external business relationships across large matrix organizations. Experience in creating and delivering leadership and skill-based curriculums for professionals in private industries and government agencies. Leadership experience in all facets of Supply Chain from Strategic Sourcing to Manufacturing/Operations to Customer Program Management. International experience in establishing a supply chain organization in Puerto Rico and negotiating complex multimillion dollar supply contracts across multiple cultures. Created and delivered a one-day program on win-win negotiations for the Institute of Supply Management that received excellent feedback and was requested multiple times by their professional members.

### **Gurpreet Singh, ASQ-MBB, CPSM, CPSD, C.P.M., Six Sigma Black Belt**

Gurpreet Singh is an International award winning Thought Leader, consultant, entrepreneur, coach and educator. He is the founder and head of the consulting firm, Strategic Supply Chain & Six Sigma Consulting, which is based in Princeton, New Jersey. In this role, Gurpreet serves as a subject matter expert on various functions within Supply Chain Management Lean Six Sigma and Operational Excellence and provides consulting services to both the public and private sector. He also provides coaching and training in the field of Lean Six Sigma methodologies, Change Management and Organizational redesign. He has trained over 1,000 executives in Lean and Six Sigma methodologies and has assisted them with Lean Six Sigma certification. Gurpreet is also an Adjunct Professor at Rutgers Business School, and has been teaching various MBA, MS and executive MBA courses in the field of Lean Six Sigma and Supply Chain Management. He shares his passion of education with other students through mentoring and shares his positive experiences with Rutgers students he teaches and others that he comes in contact with. He was appointed as an Industry Advisor to MBA students in 2014. Gurpreet Singh is an ASQ Certified Master Black Belt designated by American Society for Quality (ASQ), a distinction held by less than 100 people around the globe. Gurpreet has received several awards. Most recently, he was named the recipient of “ASQ Armand Feigenbaum Medal” for 2015. In the past for his efforts in the field of education, Gurpreet was honored with “ISM Education Person of the Year Award” in 2009 and with “Ray Clapton C.P.M. Award” in 2010. He was also honored with “ISM J. Terry Leadership Person of the Year” in 2014. Gurpreet has led countless breakthrough Six Sigma projects in various sectors and especially in Healthcare and have a proven record of achieving considerable savings while streamlining the processes and focusing on change management while developing the people involved. He has developed a multifaceted focus on cost savings and process improvement by eliminating waste and has saved millions of dollars for his clients. He has a passion to share his knowledge with his students. Gurpreet is often invited to present seminars and as a keynote speaker to several conferences across the nation.

### **Barbara Teicher**

Barbara Teicher is a national speaker, author, business coach and corporate trainer. She has 25-plus years of experience developing leaders in Fortune 50-500 companies, and government agencies, specializing in effective business communication and leadership development. She has

delivered presentations to senior officers of the most recognized brands in the world. Barbara consulted on and critiqued an executive simulation conducted at the University of Pennsylvania's Wharton School of Business. She is often interviewed on radio as a communications expert and was featured in The Kansas City Star newspaper for her new book, "It's HOW You Say It "® Effective Business Communication Skills. She is the 2014-2015 president of the National Speakers Association (NSA), Kansas City chapter, and has earned the prestigious Certified Speaking Professional (CSP) designation of the NSA and Global Speaker's Federation. She is an adjunct professor for MBA and E (Executive) MBA students with Rockhurst University.

#### **James B. Ullum MBA, C.P.M**

James (Jim) Ullum is Managing Partner and COO of Source International, a supply management company engaged in offshore supply chains and manufacturing of consumer and industrial products supplied to major brands and importers in North America. An MBA graduate of the WVU School of Business and Economics, Jim has over 25 years of international supply management and manufacturing experience including Purchasing Director at RSI-Burger King, Purchasing Manager at Teleflora and Product Manager/VP Manufacturing at Bright Of America. Prior to these positions, he operated several entrepreneurial businesses in his hometown of Charleston, WV. Mr. Ullum is a regular speaker at seminars, events and conferences on international business and supply management topics and is a member of the board of directors of the Asia Institute-Crane House. He also devotes time to Water Step-Edge Outreach and is active in real estate investments in West Virginia and Kentucky.

#### **Mark D. Weiss, JD**

Mark is a Patent Attorney and expert in intellectual property law and licensing agreements. He brings his intellectual property and licensing knowledge to the corporate classroom in interactive workshops that are easily understandable and provides useful strategies to get deals done in a logical fashion. Mr. Weis has practiced intellectual property, contract and business law for almost 15 years. He has given public and in-house presentations on topics addressing contractual issues in ***Business, Contract, and Intellectual Property Law***. Mark is a practicing attorney specializing in the areas of intellectual property, licensing, business contracts, and day to day business/legal matters. He provides contract preparation, review and negotiations for clients. He has published articles on contract law, business law, and intellectual property law and has been published in ***The Corporate Lawyer***.

#### **Matt Werder**

Seasoned senior leader with strong management knowledge and qualifications in supply chain management, information technology, operations, strategic sourcing, facilities management, quality assurance, business acumen, Lean and Six Sigma process improvement, and project management. Proven track record building results-oriented, ethical, motivated, talented, diverse performance teams while facilitating organizational change and leading with accountability. Certified Purchasing Manager (C.P.M.) by the Institute of Supply Management (ISM); Certified Materials & Resource Professional (CMRP) by the Association of Healthcare Resource & Materials Management (AHRMM); Certified Lean Manufacturing & Healthcare Process Improvement Trainer. Publication - Sourcing for Services, AHRMM Supply Chain Solutions & Strategies, November/December 2011; Samples of Public Speaking & Presentations: Contributor to the ISM Report On Business for the Health Care and Social Assistance industry (2012-2013); Member (national and local) of AHRMM (2009 – 2014); Member of the Education Committee of AHRMM (2011 – 2012); Member of the Ethics Committee of AHRMM (2013)



**Patrick S. Woods, CPSM, CPSD, C.P.M., CPIM**

Patrick has worked with over 300 companies in the U.S., Asia, Netherlands, Middle East, Africa, Central America, Former Soviet Union, and the Republic of Macedonia in various facets of SCM, including training, certifications and consulting solutions. Patrick is a Past President of ISM-Dallas and under his leadership, ISM-Dallas was presented the Affiliate Excellence Award. Patrick has led and presented C.P.M. and CPSM review training for both corporations and ISM/APICS' affiliates. He is also the GLOBAL BEST PRACTICES Chair for ISM-Dallas. Earlier, he had responsibility for seven Southeastern U.S. states and Puerto Rico. As founder of SCE-Supply Chain Education, Patrick has worked with major corporations such as Alcatel, Boeing, Fujitsu, Halliburton, Ingersoll-Rand, Atlas Copco, Verizon and Pertamina in the areas of supply chain and materials management. He has also founded the current on-line learning initiative that has been a huge success with such companies as Halliburton, Ingersoll-Rand, Atlas-Copco and Verizon, resulting in both a U.S. and world-wide roll-out with approximately 2,000 participants, primarily in the areas of C.P.M, CPSM, CPIM and Six-Sigma. Patrick has a wealth of experience in materials management and supply chain consulting solutions for high volume, fast-paced organizations such as Emerson Electric, EDS, Clark Equipment, Intergraph, Perot Systems, and NEC. His expertise includes ERP, MRP, CRP and various inventory control systems, international procurement, management of cross-functional multi-national teams. He has implemented, taught, and achieved results for two Fortune 100 corporations in both Michigan State University and ACT. Kearney strategic procurement methodologies. He has a degree in Industrial Management from the University of Alabama.