Fighting Crime Across Borders

Portland, Ore.’s new regional network will empower police with more data

PLUS:

Transitioning to Natural Gas Vehicles
Marcia Deegler’s Green Career
Retaining Top Procurement Talent
When to Outsource Energy
Hourly IT Services in New York
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32 Darin Matthews: About heroes.
Numerous readers expressed their appreciation for Darin Matthews’ column about diversity. Here is a sampling:

This is a really great article! I’ve had similar experiences with people being reluctant to “take a chance” on contractors that they have not worked with in the past. Thanks for sharing your thoughts.

Elizabeth Dunaway, CPPO
Centennial, Colo.

I just read your article entitled “Cómo estás.” As always, your articles are spot on. I’m the DBE Liaison Officer for my agency and it continues to amaze me how project managers perpetuate the barriers that prevent disadvantaged and small businesses from participating in government contracts. Kudos for everything you continue to do to advance our profession.

Jennifer Sims, C.P.M.
Procurement Director
San Bernardino, Calif.

I just wanted to take a moment to let you know I really enjoyed the article you wrote in Government Procurement magazine. I was probably drawn to it because I speak Spanish. However, the content was very interesting and absolutely true regarding the preconceived notions we may sometimes have. I think it’s great that you brought it up in our “purchasing world.”

Raquel (Diaz) McMahon
City of Chandler, Ariz.

Your article was good in that we as purchasing professionals always need to keep in mind our results are based in performance of the work, not in other factors. We, as humans, sometimes forget this and assign race, gender, religion, age or other factors as the reason that people don’t perform well. High-performing vendors and humans are just that, and underperforming are just the same.

Scott Richardson, CPPO
Coconino County, Ariz.

Hola Darin:
Como esta usted? Nice article.

Lee Buddress, Ph.D., C.P.M.
Robert G. Gleason Professor and Director
Portland State University
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PERSPECTIVES [procurement ponderable]

What if? What if? Why?

By Stephen B. Gordon

What if unnecessary public procurements no longer happened? What if only the items truly needed by governments were procured in precise conformance with needs, and as cost-effectively, efficiently and timely as possible? What if? What if? Why?

The reality is that, in general, public procurement officials have had little if any input into what gets procured, the specifications or scopes of work for what gets procured, the budget for what gets procured, or the timing of procurements. There are many possible explanations, including the unwelcome recognition that neither senior management nor clients have been interested in having procurement professionals’ input in those areas.

It’s hardly a secret that at the federal, state, and local levels, many goods, services, solutions, systems, and infrastructure are procured that should not be procured ... at all. Sometimes, elected officials insist that certain — and often, very expensive — items be procured even when senior administrators and the clients for whom the items would be procured insist those things are not needed. Sometimes, additional quantities of supplies are purchased when, metaphorically, the shelves containing those items are filled to the brim. Sometimes, unneeded items are purchased in ridiculous quantities, simply to “spend out” a client’s budget. What if? What if? Why?

Sure, procurement officials typically get to “review” the specifications and scopes of work for requisitioned items, but generally such reviews occur only after a requisition has arrived in the procurement office, and the clock is ticking toward a looming deadline. And, we all know the potential consequences (for the procurement program) when we don’t deliver on the specified delivery date – no matter when the requisition arrived in our shop. What if the rule – rather than the exception – were for client agency officials, budget officials, and procurement officials to agree early on – at least, for the strategic procurements that will need to be made — what the requirements for such items should be, given the available budget. Why can’t we change the rule?

Finally, what if procurement officials had enough time to perform the value analysis and the other analyses we know how to perform and should perform to ensure that goods, services, solutions, systems, and infrastructure are purchased in ways that provide maximum practicable support for our entities’ enterprise strategic goals and the lower-order but equally important strategic goals of the client business units, programs, and other stakeholders? What if governments’ accounting systems supported the procurement of items on a best value, long-term basis as opposed to a short-term, low-bid basis? Some of you are probably thinking that I’ve gone from visioning to dreaming. But again, I ask: what if, what if, and why?

I look forward to hearing your thoughts on this subject.

STEPHEN B. (STEVE) GORDON, PhD, FNIGP, CPPO, is the Director of the Graduate Certificate in Public Procurement and Contract Management at Old Dominion University (ODU). A past president of NIGP, Dr. Gordon also is a Professor of Practice in the Department of Urban Studies and Public Administration at ODU, where he teaches courses in public procurement, public policy, and administrative theory. He can be contacted by email at sbgordon@odu.edu.
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nyone who has served in a procurement leadership role has experienced the situation of their “best” employee being offered another career opportunity or of them saying they wish to explore other professional career options. Or, perhaps a steady performer with long-term corporate knowledge decides it’s now time to retire. Any strong leader would support each of them in his or her endeavors.

When it happens, you take a few silent moments and some long, deep breaths and begin preparing for the hiring process. You assemble the necessary documentation to request authorization to fill the upcoming vacancy and then begin the recruitment process. You focus your attention on the job announcement to ensure you entice the best of the best who have the skills and abilities necessary to support procurement’s role in the organization and the organization’s achievement of its goals. You also probably know the corresponding landscape of other public sector organizations with similar advertised positions you’ll be directly competing with. Some of them may have potentially higher salary ranges, a better work location, better work/life balance, or a more comprehensive benefits package.

So, when you’re finally able to select and hire an experienced, certified professional to meet the ever-changing demands and complexities of the profession, you’re excited to have him or her join your team. You’re also pleased when you are able to hire a recent college graduate with a major in supply chain management. Even with limited experience, his or her enthusiasm to enter the work field, public sector, and to learn and grow is invigorating. But, the question is, will you be able to maintain these individuals’ engagement, maximize their capability for high quality work, and ultimately retain them within the organization?

You must! As the importance and demand for top procurement professionals increase daily along with the enhanced strategic impact of procurement, we must ensure we are meeting the demands of the “new” public procurement professional. Many organizations offer a strong benefits package or flexible working conditions, but many other factors come into play when seeking to retain talented professionals.

Professionals today are interested in training and development, just like the professionals of yesterday – and they are interested in professional certification. But, the “new” professional also requires current communication and technology tools. For example, they require remote access to e-mail and voice mail, and they strongly desire and rely on technology and software to perform their duties.
Millennials are the most technologically savvy generation to date; they don’t even recall a day without the Internet or its related devices. They have information available at the touch of their fingers or by the sound of their voice. These are today’s professionals, and they come into the work environment with certain resource expectations. They explore their work landscape by asking questions about what tools are available to perform their required duties; spend data and analysis, standard automated processes, written policies and procedures, customer demographics and performance expectations.

Additionally, today’s professionals want to be a part of a progressive organization, one that is knowledgeable of best practices and has a focus on continuous improvement. They do not have the patience for paper processes, “phone-tag” or answers along the lines of “this is how we’ve always done it.” They ask the sometimes difficult “why” questions and look for data, data-driven decisions, consistency, standards, and technology tools for the performance of their duties while demanding a greater emphasis on performance-based outcomes. They require the tools commonly available in today’s environment, expect to complete tasks independently, and ultimately want to be evaluated on the outcome versus the road taken to achieve the outcome.

To gain and retain top talent for your procurement organization, each procurement leader must embrace change, continuous improvement, technology, and continuous learning and advancement. Without such a forward-thinking, transformative focus, the path is clear — you’ll struggle to gain and then to retain “top talent.” The struggle will dramatically impact your overall organizational performance.

Do not be afraid of growing slowly, only of standing still.

JEAN CLARK, FNIGP, CPPO, C.PM, CPPB, CPM, is a past president of NIGP, and the former CPO of the State of Arizona. She has more than 30 years of public procurement experience and is currently the Director of Procurement Transformation for the NIGP Consulting program.
The More You Know

LEVERAGING DATA TO PREPARE FOR THE CONTRACTING PROCESS

By Jonathan White

In the spring of 2013, NIGP’s strategic partner Spikes Cavell developed a Guide to Procurement Savings designed to show public sector procurement teams how they can use spend data to understand, change, and measure their procurement function. Previous issues of Government Procurement have featured articles on understanding the current spend situation, how to use data to find savings opportunities, and category analysis. Using the information from a category analysis, the procurement team can then go on to prepare for the contracting process.

But we already know how to do an RFP and negotiate a contract, don’t we? This step is not about the intricacies and legalities of carrying out a competitive procurement process – these are generally well known and understood in the procurement community, and the specific required processes can vary greatly among organizations. If you have followed along from the previous article about building a category analysis, you have already identified categories of expenditure where renewing, creating, or renegotiating existing contracts would yield savings for your organization. Preparing for the contracting process in this context is about having a thorough understanding of the spend in the specific category where a contract is being let, understanding which internal and external stakeholders to engage with, and finding out whether there is a better way to put a contract in place than the traditional RFP or RFQ process.

GETTING DOWN INTO THE DATA

Some questions you may ask yourself when preparing for the contracting process: In the category which I’ve chosen to work on, how is the spend currently spread across suppliers that have been used in the last year? Do I have one primary grounds maintenance provider with a couple of secondary suppliers? Has this category only been loosely managed in the past, leading to a lot of one-off contracts and low-dollar fragmented spending? Is this a category in which we should focus on reining in maverick spend, or one in which we don’t even have a contract in place? Do we have a contract that is meeting our needs, or do we need to find someone new? Compiling basic contract and expenditure information together in one place where it can be sliced and diced by departments will be extremely helpful in answering these questions.

Another place to look for contracting opportunities is in internal collaboration. In a decentralized procurement environment, there may be contracts that were put in place by individual departments through correct competitive processes that might be perfectly suitable for adoption by other departments, rather than putting those departments through yet another competitive process. It is always worth bearing in mind the staff costs and time required to carry out a proper competitive process and weighing the potential savings of a brand new contract versus the costs of putting that contract in place. In the example shown in Figure 1, there are 14 departments...

<table>
<thead>
<tr>
<th>vCode Vendor Category</th>
<th>Total Spend</th>
<th>Total Vendors</th>
<th>Total Departments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tree Service Contractors</td>
<td>2,025,250</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>Landscaping Contractors</td>
<td>528,480</td>
<td>12</td>
<td>14</td>
</tr>
<tr>
<td>Garden Centers and Nurseries</td>
<td>152,579</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Grounds Maintenance Providers</td>
<td>79,246</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Lawn Care Contractors</td>
<td>78,736</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Street Furniture Suppliers</td>
<td>58,185</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>External Display Providers</td>
<td>57,265</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Gardening Equipment Suppliers</td>
<td>20,278</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

Figure 1. Fragmented spend suggests there isn’t one particularly good contract in place.
utilizing 12 different landscaping contractors. While using an already-available contract may be a good idea, chances are if spend is fragmented in this way, there isn’t one particularly good contract in place.

Drilling into internal account codes might provide further information on the specific services purchased or prices paid, although this factor is dependent on the quality and completeness of coding in your finance system. Classifying the vendors according to their main business type helps to overcome account coding inconsistencies and inaccuracies.

ENGAGING WITH STAKEHOLDERS

It’s crucial to engage quickly with those in the organization who have bought goods or services in the recent past, identify what needs they have, and understand why they have a preference for a particular vendor in order to ensure that these considerations are included in the procurement specification and resulting contract. The more requirements covered and the more stakeholders engaged in the preparation phase of the contract, the better the likelihood the contract will be fully utilized to maximum advantage, and that maverick buying will be reduced after the contract has been signed. You may even be pleased to find that there is some category expertise in your departments.

Combined with your own procurement expertise, category knowledge will make it easier to procure the right goods or services that stakeholders need, at the best prices available and with favorable terms and conditions, all while following the procurement code of the organization. Looking at the example in Figure 2, while you might think that the Parks and Recreation department would spend the most with landscapers, tree service contractors, and garden centers, the chart shows that this is not actually the case. While you don’t want to ignore the smaller departments, Works and Construction spends nearly as much in the category as all the other departments combined; their experience may be invaluable.

THE CURRENT CONTRACTING SITUATION

Last but not least, in preparing for the contracting process, it is helpful to understand what contracts are already in place. This can be accomplished through a simple excel spreadsheet listing contracts, vendors and expiration dates, or through a more complex contract management solution. Whichever you use, do you know what contracts you already have in place and when they are due to expire? Is there a short, medium or long term opportunity to consolidate spend on contracts with a smaller number of suppliers leading to a higher discount? Are there any recently expired contracts that have caused the organization to become noncompliant with its own procurement code? Is there a current contract with a local vendor on which a decision not to renew when renewal options are available would be politically difficult? Are there any opportunities to piggyback on collaborative contracts that might save considerable time, effort, and money?

You don’t have to answer all of the questions in this article to prepare for the contracting process, but the more you know, the more focused and effective your procurement efforts can be. Remember that, in many situations, your vendor knows more about the industry, market conditions, and pricing than you can possibly know. While you are responsible for 300 different categories of spend, the vendor only needs to know a few. Adequately preparing for the contracting process can help level this information advantage. There is information about your expenditure that your vendor can never know, and which may provide an edge in negotiations. The next article in this series will examine ways to monitor procurement savings and efficiency over time.

JONATHAN WHITE is Territory Director for Spikes Cavell, Inc., which equips decision makers in the public sector with the business intelligence, online tools and analytical insight to transform the way they procure goods and services. The Spikes Cavell Observatory is an online platform that facilitates delivery of spend and contract visibility quickly, affordably and with little effort on the agency’s or institution’s part.
“Outsourcing” traces its modern roots to the global expansion of business in the 1970s and 80s. During this time frame, the mindset was that, in order to compete, organizations must focus on their core business, and then identify other critical services that could be accomplished by contracting outside the organization. An organization typically would “outsourcing” if it did not have the necessary internal competency. These outsourced services were those necessary to run the organization, often highly specialized, but not related specifically to the core business.

While this movement picked up steam in the private sector, the public sector soon embraced the strategy. When it comes to procurement by federal agencies, the General Services Administration (GSA) is a perfect example. A particular federal agency will utilize its own staff and expertise to deliver the goods and services required by the agency, while outsourcing the procurement function for various products and services to the GSA. While the concept is straightforward and time-tested, many entities have shied away from outsourcing because they felt it threatened their role, added cost and time, or in some cases, because their governing body felt it should be done internally. Here we will investigate when it makes sense for an organization to outsource the management and procurement of energy for its facilities, and how to discuss the decision within the organization.

Lack of Personnel. When you don’t have the staff available to devote the necessary time, outsourcing makes sense. This is such a common theme with governmental entities that it is almost overlooked today. In most departments, when an organization looks at the list of what needs to be done, the next thought is that several more people need to be hired. The reality, though, is that the funds needed to hire those people never seem to materialize. Therefore, the old mantra arises, “You must do more with less.” When it comes to managing and procuring energy, if the staff is not available to devote the necessary time, then organizations many times just stay with the local utility or rely on their current supplier to continue providing service. Any option that does not involve a full competitive procurement process ultimately leads to a less desirable price and a higher utility budget.

Lack of Resources. When the job you need to do requires a certain set of tools/resources you don’t have, outsourcing makes sense. In situations when a purchasing department has the personnel available to conduct a fully competitive procurement for energy services, the issue then becomes whether the resources are present to lead to maximum success. In terms of energy procurement, the most essential resource is daily, direct access to the wholesale energy markets. More than any other factor, it is the wholesale price of energy that directly affects the retail price the end user will pay. Therefore, the very best thing that an organization can do to increase the likelihood of contracting at a favorable time, is to actively monitor the wholesale market on an ongoing basis to fully understand the current market and the factors that may cause prices to rise or fall today, tomorrow, or next week. If your organization does not have this ability, outsourcing to a firm that...
is involved directly in the wholesale energy market is by far the best way to obtain this resource competency.

Lack of Expertise. When your current staff doesn’t have the experience or expertise to successfully complete the job, outsourcing makes sense. So what about the situation where an organization feels it has the staff and the resources necessary to procure energy? One might then ask if the staff actually has the expertise necessary to bring these pieces together successfully. The right tool, in the hands of someone who doesn’t know best how to use it, is many times as ineffective as using no tool at all. The best resolution always comes when the person coordinating the procurement is an expert in the field of energy, with a thorough understanding of both the wholesale and retail markets and many years of experience advising users.

The bottom line is that, in order to ensure an organization procures the right price, at the right time, under the best contract terms, you must make sure you have dedicated staff with a high level of expertise in the energy sector, along with the resources necessary to access, understand, and interpret movement in the wholesale market. Only if you have all of these pieces in place should you attempt to procure energy services internally. For those organizations that do not, outsourcing the management and procurement of energy not only makes sense, but is the responsible thing to do in order to best control and manage an organization’s utility budget. It’s all about “return-on-investment” – any added cost of outsourcing is superseded by the overall lower cost of energy. When all the pieces are utilized properly, and the procurement department is able to continue to demonstrate its value by saving dollars that could be better utilized in other areas, everyone will agree it’s IN to OUTsource energy.

BOB WOOTEN, C.P.M., CEP, is Director of Government Accounts for Tradition Energy, and has more than 20 years of experience managing government procurement programs for a wide variety clients including cities, schools, colleges, universities, housing authorities and municipal districts. Wooten holds professional certifications from the Association of Energy Engineers and the Institute for Supply Management, as well as a B.A. from Texas A&M University, and a Masters in Public Administration from the University of Houston.
Data-Driven Transformation
NEW YORK STATE STREAMLINES CONTRACTS FOR HOURLY IT SERVICES
By Larry Anderson

State agencies depend on contracting hourly information technology (IT) services to deal with the rapid growth of technology advances. In New York, state procurement (NYSPro), a division of the Office of General Services, addresses the need to hire hourly IT consultants using an internal managed service provider model. A small pool of qualified IT vendors, whose performance is evaluated annually, enables authorized contract users to alleviate previous challenges of hiring hourly IT services.

The simplified process uses only 20 active vendors, a sharp contrast to the previous approach. New York formerly had 700 such IT contracts, and each took time and work to put in place – and additional resources and expenses to administer. Multiple contracting vehicles across various agencies had widely varied pricing and skill definitions. Hourly rates could differ as much as 40 percent. In addition, only a small percentage of those holding contracts had significant spend – some had zero spend for several years. Goals were to reduce the number of contracts while standardizing pricing and increasing predictability of results.

Spend Analysis and Best Practices
Data drove the transformation. A detailed spend analysis showed New York state executive agencies paid approximately $140 million for hourly IT services in 2010-2011. Procurement undertook a detailed data collection among 95 total vendors (who responded to the data request) and among seven of the state’s high-spend agencies. The analysis showed that 80 percent of the spend went to 10 vendors.

New York also looked at other states that use various contracting models for IT spending, including California, Florida, Texas, New Jersey, Pennsylvania and Arkansas. Other states use approaches including a single-vendor-managed system, backdrop contracts with vendor-direct purchasing, and a hybrid of backdrop contract and mini-bid RFPs. Gleaning best practices, New York sought to create a managed service model the state could administer internally, while streamlining the process to make it quick and cost-effective.

After the initial data request from agencies, NYSPro had in-person conversations to discuss needs and pain points, and to find the commonalities. “The common concern that I received was timing,” says RoAnn M. Destito, Commissioner, New York State Office of General Services. “When they needed it, they wanted to on-board someone as quickly as possible” – in four to six weeks rather than four to six months.

Pay for the new hourly contracts was determined based in part on the regional divisions used in the civil service system for state employees. Vendors were requested to provide hourly bill rates for three specific geographical regions, creating competitive pricing schedules for customers in New York City and also in less-densely-populated areas. Vendors communicated their varied costs of recruiting and replacing personnel resources in various regions of the state.

State hourly IT contracts formerly used a “price not to exceed” approach that did not provide transparency into how much the vendor retained in markup and how much was paid to the hourly consultant. The new contract specifies both a wage rate and a fixed markup percentage. Controlling the amount of the
vendor’s markup enables recruitment of higher-paid workers, less turnover, and overall lower costs. Each job title combination has a fixed hourly bill rate that is calculated by multiplying a wage rate (that must be paid to the consultant) times the vendor’s fixed markup percentage, all established during the competitive RFP process. Thus, standardized, competitive pricing was established for hourly IT services.

NYSPro also used a 40/60 Technical/Financial Evaluation formula as part of the RFP evaluation. Many states use a 70/30 or similar split that leans heavily toward Technical, which can favor large vendors and remove the incentive to provide truly market-based pricing.

FEWER VENDORS, BETTER RESULTS

New York wanted to decrease the number of vendors while maintaining leverage and providing an incentive to provide top-level service. NYSPro heard from authorized users that they wanted to make sure vendors were providing the best candidates for the rate. The solution in the end was to provide a “carrot” of new business and to be open about all the requirements. “It allows us to keep the vendor pool fresh,” says David M. Burmaster, Contract Management Specialist with New York State Procurement (NYSPo). “When vendors are competing against each other it benefits New York State.”

New York’s hourly IT contracts work with a pool of 20 active vendors, and there is an additional pool of five “wait-listed” vendors ready to step in. The current 20 vendors are evaluated, and the five that receive the lowest ratings are dropped, and the five wait-listed vendors step in. An additional five are then wait-listed. Burmaster says the idea came from the practice of “relegation and promotion” used by European sports teams.

In addition to providing coordination and transparency, the state wanted to provide for businesses that were sometimes shut out. Meeting Minority and Women’s Business Enterprise (MWBE) goals is a criteria for evaluating each contract. To encourage competition, NYSPo developed requirements specific to the needs of customers and did not expressly or implicitly favor larger vendors. Vendors who could demonstrate suitable subcontractor networks, effective candidate recruitment strategies, streamlined on-boarding procedures, and MWBE participation are scored more favorably.

Evaluations provide a “report card” on how vendors meet MWBE goals, handle required reports, respond to solicitations, pay on time, and provide overall customer satisfaction. “We took all the things that New York State requires and put some teeth behind them,” says Burmaster. “If you don’t do this as a vendor, there are consequences.”

The hourly IT contracts can also be used at the local level; a standardized process means local governments don’t have to “reinvent the wheel.”

“We want to make sure everybody understands there is transparency, competition, value and quality customer service,” says Destito. “We created a system that is competitively bid, provides good value, and is a simple and speedier process than was in effect in the past.”

Procurement of hourly IT services is among the first benefits of New York’s new strategic sourcing effort. The managed service model significantly improves purchasing efficiency and produces an estimated $37 million in annual savings to state agencies and millions more for local government customers. New York State’s hourly based IT services program won the 2013 George Cronin Bronze Award for Procurement Excellence awarded by the National Association of State Procurement Officials (NASPO).

Since implementing the program, NYSPo has seen tangible results in improved processing times, placement of candidates, fair candidate compensation, overall savings and MWBE utilization. Candidate placement times have been reduced to about 30 days.
Fighting Crime Across Borders

Portland’s RegJIN data network will provide vital information for police

By Larry Anderson

Criminals don’t respect jurisdictional borders, and police officers serving five counties around the Portland, Ore., area must therefore share crime information across borders, too. Updating a 30-year-old system, the new Regional Justice Information Network (RegJIN) will provide police data to track activities across multiple jurisdictions to help fight crime.

The new network is replacing a legacy system that was developed in-house three decades ago. Thirty years later, the people who worked on the old system are now either retired or near retirement, and they are the only ones who know anything about maintaining it. To avoid such a dilemma in the future, the new system will use commercial off-the-shelf (COTS) software and hardware. Throughout the decades using the legacy Portland Police Data System (PPDS), agency after agency have opted to join Portland’s system, and working together over the years developed a comfort level that now enables greater cooperation as the system changes.

The RegJIN project is replacing the old system to improve public safety in the Portland, Ore., metropolitan area. A single, regional records management system will be used by almost 40 law enforcement jurisdictions, providing all the capabilities of the previous PPDS along with expanded, more integrated functionality.

Officers’ reports are compiled in a main database that keeps track of various offenses and can be used by police officers for research, crime analysis and investigation, sharing information across multiple law enforcement agencies in the five-county metropolitan Portland area and southwest Washington state.

“The new records management system known as RegJIN will provide an integrated police data system to 40 different law enforcement agencies across two states, counties and
municipalities and represents one of the biggest changes to managing police records in over 30 years,” says Captain John Brooks of Portland Police Bureau’s Records Division.

PLEASING DIVERSE STAKEHOLDERS
Portland set out to analyze the business case for replacing the legacy system and to look for a funding source. Stakeholders were Portland’s police bureau and other law enforcement agencies that would be using the system. Portland’s police bureau, with guidance from the procurement department, developed a needs analysis, determined the scope, and created a request for proposals. “We put together a set of requirements and sent it back to the stakeholders and users to review and make sure everything was complete,” says Jeff Baer, program director.

A Project Advisory Committee met semimonthly in the early stages and now meets monthly as the project nears completion. The PAC works through project issues, seeking consensus on issues such as how the costs of the system will be shared among the jurisdictions. Typically 35 to 45 people show up at each PAC meeting, representing the jurisdictions involved, which include local law enforcement agencies for governments, large hospitals, universities, and the port of Portland. Each participant has to be a certified law enforcement agency. An Executive Steering Committee of Portland’s public safety directors are the governing board.

The procurement process followed the specific rules of the city, and an independent quality assurance consultant ensures things are done the right way by providing monthly status reports. Pleasing the diverse stakeholders was a challenge. “It was a thoughtful, deliberative process to evaluate the responses and make sure they met all the requirements,” says Baer.

The project was presented for funding to the Portland City
Council, which provided authorization to award the contract. Portland was positioned to have leverage as the project unfolded, controlling the funding and scope of the work.

**USING DATA TO REDUCE CRIME**

The new system will modernize law enforcement data collection and record-keeping. The fully integrated system will provide law enforcement modern, state-of-the-art tools without redundant data entry or data loss. More sharing of data among regional law enforcement agencies will provide enhanced, faster access to crime information and emerging trends, thus reducing crime and increasing officer efficiency. The secure, highly available environment will ensure data confidentiality.

“We are the largest consortium that spans two states,” says Jerry Schlesinger, project manager, who adds that different rules for treating crime information among states makes it difficult for such a system to cross state boundaries. “We are working together to meet the needs of two states. A lot of people are watching.”

The project consists of three components – hardware, software and service. Portland decided to buy and install the hardware through the city’s Bureau of Technology Services. The software and service contract requires the vendor to be responsible for system operation as long as vendor-recommended hardware is used.

The city bought a site license from software vendor Versaterm to enable the system to be used on every desktop in the five-county region, a maximum of 1,000 users. The site license avoids the need to track individual licenses for each user. Each police vehicle using the system must also have mobile reportage client software, a total of 1,200 mobile licenses in the total geographic area, each paid by the local jurisdiction.

Consistent with the decision to use COTS equipment, an early decision was made to have “no customization.” Fortunately, the configurable Versaterm system accommodates the needs.

**PAYING FOR THE NEW SYSTEM**

The city of Portland is funding the $12.7 million capital expense for the system and will be charging each participating jurisdiction a monthly fee to use the service, based on the number of officers in the jurisdiction. As the system prepares to launch, the fee is expected to be between $45 and $75 a month per sworn officer. (The final fee will depend on how many participate.)

A million-dollar UASI grant was used to develop interfaces between the new system and existing jail and computer-assisted dispatch (CAD, or 911) systems, for barcode scanners that work with driver’s licenses, and for Web-based citizen interfaces. A “soft,” early roll-out in May will involve 1,000 users, and full implementation of the system is expected to be completed by December 2014.

Procurement was a critical player throughout the process, and Baer’s past experience working in the procurement department helped guide the process, including meeting legal standards and reaching a consensus among stakeholders. “It was also dealing with the different personalities, and the whims of various stakeholders,” says Baer. “A lot of compromise has to happen.” Baer’s expertise also enabled him to work effectively with various city attorneys’ offices to craft language in the intergovernmental agreements (IGA) that underlie the system.

Procurement guided the solicitation process to identify Versaterm as the vendor. The COTS hardware was purchased using existing contracts. Procurement spent several months negotiating the agreement, going through the boilerplate language to get a final contract the city and vendor were willing to sign off on. There was also a solicitation to hire the external quality assurance consultant.

Baer’s procurement background and familiarity with negotiation strategy helped in overall management of the project. Also participating from the city’s Procurement Services Group were Estelle Bollinger, whose background includes contract language; and Scott Schneider, who has the needed knowledge of intellectual property issues.

**TRUSTING THE PROCESS**

The project started with 18 agencies participating, and the number has now grown near 40, and there are requests for additional agencies to join. “We are holding off adding more agencies until after we go live,” says Baer.

But how well will the system work in the end? “From my perspective, I have to trust the process we’re going through,” says Schlesinger. “It’s been challenging, but it’s gotten us to the point that we’re comfortable it will meet our needs. We’re exercising the system on a daily basis, so we have confidence it will perform. All the indicators are that it should work and meet our expectations.”

RegJIN is part of Portland’s Public Safety Systems Revitalization Program (PSSRP), a multi-year, coordinated effort among regional partners to replace or upgrade aging public safety technology systems in order to sustain vital emergency response services. The key driving factors for the program are the inability to receive ongoing maintenance from current public safety systems vendors and the retirement of key system support staff. There is also difficulty maintaining interoperability with existing systems. In addition to the RegJIN project, PSSRP is working to replace the public safety emergency radio system, which is comprised of obsolete analog technology from the 1990s; completion is targeted for summer 2015. The program is also planning to update fire and other public safety systems.

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_LARRY ANDERSON_ is editor of Government Procurement magazine.
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Transitioning to NGVs

Given the abundant domestic reserves, states are nurturing the young market for natural gas vehicles

By Mike Richart

Marcellus Shale, which extends throughout the northern Appalachian basin in the Eastern United States, contains largely untapped natural gas reserves to provide the United States with previously unavailable energy prospects. According to the Marcellus Shale Coalition, Marcellus is thought to be the second-largest natural gas field in the world, covering five states — Pennsylvania, Ohio, West Virginia, New York and Maryland. It produced 3.1 trillion cubic feet of gas in 2013 alone, and is expected to produce more than 70 billion cubic feet per day in 2014. Aside from its impact on heating homes and generating
electricity, Marcellus is allowing development of a new market for natural gas vehicles (NGVs), providing a significant opportunity to use domestic energy resources for transportation while reducing the environmental impact of gasoline-powered vehicles. NGVs are reported to reduce emissions of carbon monoxide and nitrogen oxides by 70 percent and 87 percent, respectively, through burning compressed natural gas (CNG).

NOT ENOUGH FILLING STATIONS
States eager to transition their fleets to NGVs are faced with a marketplace in its infancy. The market’s current infrastructure is inadequate to support consumer growth, whether private or public, fleet or individual. This problem was identified several years ago in a report by TIAX for America’s Natural Gas Alliance. The report identified that the number of fueling stations in the United States reached its peak in 1997 with an estimated 1,400 stations and then began declining until 2004 when the number of stations fell to below 1,000.

Today, however, the U.S. Department of Energy (U.S. DOE) website “Alternative Fuels Data Center,” which is dedicated to all types of alternative fuels, lists the current number of stations at 1,500, although this includes both planned stations and private stations. A filtered search accounting for those variables puts the number of current public sites at 681 with California having the highest number at 143 and Oklahoma the second highest with 74. Comparing that number to the 157,000 public retail gasoline filling stations across the United States puts the problem in clear focus.

How many CNG filling stations are required to sufficiently support NGVs? The TIAX report, using a ratio of diesel stations to gasoline stations, estimated between 10 to 20 percent of the current gasoline stations, or between 16,000 and 32,000 CNG filling stations, would be needed to make CNG readily available for private consumers and fleets. “If CNG is to become widely accepted and the market for fueling infrastructure is to grow beyond high-fuel-use fleets, accommodating a variety of vehicle classes and fueling needs, and ultimately connecting fueling infrastructure between cities, counties, regions, and states, retail and truck stop outlets need to be developed in numbers that allow reasonably convenient access to CNG. This does not mean that CNG infrastructure needs to be equivalent to gasoline and diesel, but it does need to be increasingly more available and convenient for fleets and the general public.” If these numbers are correct, states that wait for the market to build out the infrastructure may continue to experience growing pains as some forecasts predict reaching only an estimated 30,000 filling stations worldwide by 2020.

COORDINATED EFFORT AMONG STATES
Some states are not waiting. In an attempt to address the issue, governors from four states — Oklahoma, Colorado, Wyoming, and Pennsylvania — signed a Memorandum of Understanding (MOU) in November 2011 with the intent to create “a coordinated effort ... to attract automobile manufacturers in the U.S. to develop a functional and affordable original equipment manufacturer (OEM) fleet natural gas vehicle (NGV) that will also meet public demand” as well as to encourage an energy future that utilizes domestic energy resources to fuel [the] nation’s transportation needs.” Since 2011, 16 states signed on and are participating in the MOU.

To achieve the goals of the MOU, the Western States Contracting Alliance and the National Association of Procurement Officers (NASPO) led a group of 22 states to develop and release a Request for Proposal (signing the MOU was not a requirement to participate in the RFP) that aggregated their vehicle requirements. The RFP resulted in bids from dealers in 28 states for various vehicle platforms currently available, and awards were made to Chrysler, Ford, GM, and Honda.

As a member of NASPO, Oklahoma led the cooperative effort and is one of the leading states in the push for NGVs. Although the market has limited vehicle offerings, the lack of options was not an obstacle as they focused on all varieties and specifically on the heavy-duty trucks and vans. Since October 2012, Oklahoma purchased a total of 431 vehicles and expects that number to increase later this year when agencies take delivery of 250 to 300 Ford half-ton pick-up trucks. Vehicles purchased to date include 3/4-ton trucks from Ford, Chevy and Dodge; Honda Civics; Ford Transit Connect Vans; and Ford Cargo Vans.

To take full advantage of its investment, Oklahoma understood it needed to also address its limited infrastructure. It chose not to be directly involved in site placement or development, but has worked closely with CNG retailers to help demonstrate demand and determine strategic locations for new sites.

One approach that is working effectively is the creation of a working group of CNG retailers and other interested parties, such as natural gas utilities, to provide input on infrastructure development. This group helps provide a forum for a more public discussion through a series of town hall meetings led by Oklahoma Secretary of Energy and Environment Michael Teague. Local elected officials, vehicle dealers, CNG retailers, private fleet operators and members of the public are invited to public forums in areas where a need for new CNG filling stations is identified, specifically targeting areas of the state that are on or near major thruways and in proximity to state offices and private fleets already running on CNG. The goal of these events is to demonstrate public demand for new CNG infrastructure, discuss the incentives available for infrastructure development and CNG conversions, and to build local political support to encourage retailers to make the necessary investments.

Oklahoma’s legislature also enacted legislation, statute 74
O.S. § 78f, governing the use of CNG in the state and setting a goal to have one public filling station every 100 miles on interstate highways by 2015 and one every 50 miles by 2025. As a result of Oklahoma’s efforts, it is number two in terms of the number of available CNG stations with a total of 94 public and private stations, 74 of which are open to the public.

Pennsylvania’s Approach

As one of the original signers of the MOU, Pennsylvania Governor Tom Corbett has been a champion of NGV conversion and understands the potential benefits Marcellus Shale offered NGVs. In 2011, he created the Governor’s Marcellus Shale Advisory Commission and tasked it with developing a “comprehensive, strategic proposal for the responsible and environmentally sound development of Marcellus Shale.” One major area of focus for the Commission was that of infrastructure. As a direct result of its work, the Governor set a goal to develop “Green Corridors” throughout Pennsylvania that would place filling stations at least every 50 miles and within two miles of designated highways. Pennsylvania currently has 54 stations with 29 open to the public.

To further address Pennsylvania’s CNG infrastructure, Governor Corbett directed Secretary Sheri Phillips of the Department of General Services to work through a Request for Information process to better understand options available in the market in order to determine the best approach for Pennsylvania to further address its infrastructure and own fleet vehicle opportunities.

Virginia’s Public-Private Partnership

Although not a participant in the MOU, the Commonwealth of Virginia also embarked on a policy to increase NGV use. In 2011, Virginia’s General Assembly passed House Bill 2282, which directed establishment of a plan to replace state-owned or operated gasoline vehicles with vehicles that operate using natural gas, electricity or other alternative fuels. Other alternative fuels are defined as ethanol, propane, biodiesel, hydrogen and others as identified by alternative fuel providers.

To fulfill this requirement, the Commonwealth utilized a Public-Private Partnership (P3) to investigate the feasibility of such a plan. This P3 initiative was conducted in accordance with the Public-Private Educational Facilities and Infrastructure Act (PPEA) of 2002 and required industry leaders in vehicle manufacturing, alternative fuel infrastructure, producers of alternative fuels and other alternative fuel experts to partner with each other and with the government to develop and implement a plan to expand CNG use.

As a result of the PPEA, a contract was awarded to Clean Energy for a natural gas (CNG) solution. The contract includes provisions for fueling infrastructure, statewide fuel pricing and vehicle conversions. The Virginia Alternative Fuel PPEA currently has access to two CNG fueling stations which are owned and operated by Clean Energy and are open to the public. It provides a target of gasoline gallon equivalent (“GGE”) usage of natural gas purchase volume required to support a natural gas fuel infrastructure site of 180,000 GGEs per year. Virginia has 5 public filling stations operational and purchased 4 Ford Transit Connect cargo vans to date. Cities and counties are also working to include NGVs in their fleets.

Encouraging Private Conversion

Not only are states purchasing NGVs for their fleets to encourage expanded use, they are providing grants and financial incentives to private entities to promote building NGV fleets. In 2012, Pennsylvania’s Governor Corbett signed Act 13, which provides $20 million over three years for the new Natural Gas Development Program. This program provides funding for fleet conversion of vehicles 14,000 pounds and greater. Additionally, Governor Corbett has helped focus the existing Alternative Fuel Incentive Grant program to provide financial assistance for fleet vehicles under 14,000 pounds. Governor Corbett recently awarded another $7.7 million to 25 companies and organizations to help them in converting their heavy-duty fleet vehicles.

Oklahoma Governor Mary Fallin has been an advocate for CNG vehicle conversion during her tenure. She is encouraging commercial interest in developing new CNG filling stations in through a state infrastructure tax credit available for 75 percent of the cost of qualified clean-burning motor vehicle fuel property (such as a retail CNG filling station). The state also offers a 50 percent credit for installation of home compression refueling devices and a credit for 50 percent of the incremental cost of converting a vehicle to run on CNG.

Overcoming Challenges

Marcellus Shale is not only providing the United States with previously unavailable energy prospects, but it is also providing an opportunity to develop a new market within the transportation sector. This new market is young and, as with many young markets, creating challenges. But the challenges can be overcome through innovation and creativity. Two states are proving it can be done and 20 other states are working to use creative solutions like grants, tax incentives and P3 agreements to achieve it. If NGVs are to become a practical substitution for gasoline powered vehicles, solutions like these help to bridge the gap.

Mike Richart, C.P.M., is Pennsylvania’s Deputy Secretary for Procurement, Department of General Services, Bureau of Procurement in Harrisburg, Pa. He has 13 years of experience working in state procurement at every level.
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Marcia Deegler Makes A Difference
Looking back at 19 years of green history in Massachusetts

By Scot Case

Marcia Deegler, a green purchasing pioneer with the Commonwealth of Massachusetts’ Environmentally Preferable Procurement (EPP) program since 1995, retired at the end of February after 19 years with the program, including 13 as its director. She left behind a green purchasing program widely recognized as one of the most innovative and successful in North America, an extensive collection of green purchasing tools, and legions of green purchasing advocates around the world.

PROGRAM HISTORY

Massachusetts’ EPP Program began in 1995 as a buy-recycled program designed to create markets for recycled content products, products made from the materials collected by curbside recycling programs. At the time, the country’s recycling infrastructure was still in its infancy and markets for the recovered materials from curbside recycling programs were weak. Massachusetts decided to use its purchasing power to create demand for recycled content products by specifying products such as recycled-content copy paper, paint, plastic lumber and motor oil.

Hired as a trainer in January 1995 by Eric Friedman, the newly appointed Environmental Purchasing Coordinator, Deegler’s initial task was to conduct a dozen buy-recycled training sessions throughout Massachusetts over six months. At the time, she knew nothing about government procurement, but her days as a reporter covering environmental issues and local recycling programs helped.

“I began interviewing government purchasers, reading procurement manuals, and talking with end users. I became fascinated with the tremendous influence government purchasers have and how they could use procurement and their purchasing power to create environmental benefits,” remembers Deegler.

She also quickly began identifying some of the common challenges that would be faced by all environmental purchasing programs – end users and purchasers concerned about the performance, the difficulty finding and specifying, and the additional cost of some greener products.

“Being based in the purchasing office was a key element to the success of our efforts,” Deegler recalls, “as it allowed us to form solid trusting relationships and to better understand the responsibilities and challenges of the purchasing staff.”

Marcia Deegler spent the next 19 years systematically tackling those challenges, taking over as program director in 2001, and helping to grow the Massachusetts EPP Program beyond its initial focus on recycled-content and energy efficiency to a program addressing all of the hidden human health, environmental, and social impacts of routine government purchasing decisions. She was supported by her purchasing partners as well as a talented band of college interns over the years, most of whom dedicated their time and skills without pay for a semester to promote green purchasing.

GROWING GREEN PURCHASING

As Deegler was building her green purchasing training binder (one acetate transparency slide at a time), she and Friedman realized that Massachusetts needed a variety of tools and strategies to make green purchasing successful. They launched a series of successful projects to grow the program, projects that Deegler continued and expanded with the help of colleague Dmitriy Nikolayev after Eric’s transition to Director of the State Sustainability Program.

Vendor Fairs. From the very beginning, Friedman and Deegler recognized that they needed a way to bring purchasers, end users, and vendors together. The purchasers and end users needed to see, touch, and try the greener products from local manufacturers and vendors and be able to explain any concerns about quality, performance, or availability. The manufacturers and vendors needed to hear purchasers talk about their interest in and a willingness to buy greener products.

To meet the needs of both purchasers and vendors, Friedman and Deegler launched the first EPP Vendor Fair in 1995. It was attended by about 30 vendors and around 150 purchasers and end users, all of whom found the fair incredibly beneficial. Over the next 15 years, the fair grew to regularly attract more than 1,200 attendees, and there was a waiting list for the 175 booth spaces with vendors competing for the right to display their greener product offerings.

In 2010, the EPP Vendor Fair was combined with the larger MassBuys Expo, which is the largest business-to-government trade show in Massachusetts with more than 360 vendors represented. MassBuys now features and promotes many of the greener product offerings available on state contracts.

Focus on Savings and Measuring Return on Investment. Deegler quickly understood that EPP purchasing would not survive if it based its existence only on the environmental benefits. She worked with colleagues to develop a comprehensive training program on how to analyze the financial savings of going green and how to properly measure the return on investment. It was important to show the direct financial benefits of going green; otherwise, the green purchasing initiatives would not be sustainable.

The purchasers and end users needed to see, touch, and try the greener products from local manufacturers and vendors and be able to explain any concerns about quality, performance, or availability.
IN DEPTH [green purchasing]

benefits it generated. She helped expand the program to focus on things like energy efficiency because it was possible to calculate both environmental and financial benefits when buying more energy-efficient products. Purchasers and end users began seeking out more energy-efficient lighting, office equipment (computers, fax machines, copiers), and heating and ventilation equipment.

She also looked for other greener purchasing opportunities that produced measurable cost savings and environmental benefits such as high-quality, remanufactured toner cartridges for printers and copiers and recycled-content lumber that proved to be more durable than traditional lumber and significantly reduced maintenance costs.

By 2013, the EPP Program documented that the program saved $4.6 million in reduced costs while avoiding 29,000 tons of global warming emissions.

Green Cleaning. With Deegler’s help, Massachusetts also became one of the first states to buy green cleaning products as a way to reduce its purchases of toxic and hazardous chemicals. In 2001, Deegler worked with the Responsible Purchasing Network (then a program of New American Dream); King County, Wash.; the City of Santa Monica, Calif.; and others to adopt a national standard for green cleaning products. Until that time, several government purchasers had developed their own standards, which made it challenging for manufacturers to respond to sometimes competing standards. Massachusetts was the first to use the standard, proved that there was adequate competition among the suppliers of products capable of meeting the standard, and issued the first state-wide green cleaning contract. Many other state and local governments continue to emulate the approach first developed by Massachusetts.

Executive Order 515. Recognizing the growing success of the EPP Program and seeking ways to further enhance the program’s effectiveness, Gov. Deval Patrick issued Executive Order 515 in 2009. It recognizes the value of reducing the adverse human health and environmental impacts of state purchasing decisions while reducing costs and promoting economic development. EO515 requires all Commonwealth agencies to buy environmentally preferable products as long as they are readily available, meet performance requirements, and represent best value to the Commonwealth. It also specifically requires all agencies to use green cleaning products.

The Executive Order is a powerful endorsement of the EPP Program and has helped fuel the Program’s continued success.

Green Contracts. Massachusetts now has more than 60 contracts with environmental requirements. They are listed in the Guide to Environmentally Preferable Products and Services available on the Massachusetts EPP website at www.mass.gov/epp.

The contracts cover products like green cleaning products, landscaping services, office supplies, alternative fueled vehicles, water treatment chemicals, retread tires,

Awards and Recognitions for Massachusetts’ EPP Program

2009 Marcia Deegler was personally honored with the Governor’s Manuel Carballo Award for Excellence in Public Service, the Commonwealth’s highest honor for Executive Department employees.

2007 Outstanding Program Award, National Association of State Chief Administrators (NASCA)

2005 The Cronin Club Innovation Award, GOLD, National Association of State Procurement Officials (NASPO)

2003 Environmental Merit Award, U.S. Environmental Protection Agency New England

2002 The Cronin Club Innovation Award, Bronze, National Association of State Procurement Officials (NASPO)

2001 Best Government Buy Recycled Program Award, U.S. Conference of Mayors

2000 Best Business or Government Buy Recycled Program, National Recycling Coalition (NRC)

1998 EPA Partner for Change, U.S. EPA Region I


1997 Buy Recycled Award, the Massachusetts Recycling Coalition (MassRecycle)

Awards compiled by Dmitriy Nikolayev, Commonwealth of Massachusetts.
furniture, toner cartridges, carpet and flooring, trash bags, traffic paint, recycling services and more.

**EPP Tools.** In addition to the guide to greener products and services, Deegler and her EPP Program team developed the EnviroCalc tool. It is a spreadsheet for calculating the environmental benefits of buying recycled-content and energy-efficient products. The results are reported as financial savings and environmental measures such as landfill space savings, global warming pollution savings, and annual tailpipe emission savings (based on automobile pollution emissions).

EnviroCalc and several other EPP tools, including tools to calculate the benefits of buying hybrid electric vehicles, computers meeting the IEEE1680 green electronics standard, and the environmental benefits of recycling, are located on the EPP website (www.mass.gov/epp).

**National and International Collaboration.** To many purchasing professionals, one of Deegler’s most important contributions has been her tireless efforts to share the Massachusetts EPP Program story with others. She has been involved in numerous initiatives and efforts to promote green purchasing, share green purchasing strategies, and train green purchasing professionals.

In addition to countless presentations and webinars, Deegler served as Vice Chair of the National Association of State Procurement Officials (NASPO) Green Purchasing Committee and helped found the Responsible Purchasing Network (formerly a program of New American Dream), both of which provide green purchasing information to government purchasers.

“I wanted to share our story because real progress can only be made through collaboration,” Deegler explains. “Massachusetts is not a huge state, so we need the support of other states across the country to demand greener products so industry receives a concerted message from government agencies.”

This is where the support of RPN, NASPO and others has made such a powerful difference, according to Deegler. “Increasing purchasing volumes nationwide creates competition, improves product performance and availability and reduces prices for all. I look forward to even more states coming on board as they see the dollar saving opportunities and health and environmental benefits.”

**NEXT STEPS FOR A GREEN PIONEER.**

While Deegler is enjoying the early days of retirement by spending time with her grandchildren and with her paintbrushes, easel, and some blank canvases, Julia Wolfe is busy ensuring Massachusetts remains on the cutting edge of the green purchasing world.

For the past year, Wolfe and Deegler split the role as Director of the Massachusetts EPP Program. Wolfe is now the sole director, and she is already busy on a number of projects:

- Massachusetts is launching a new online purchasing system called CommBuys that will make it easier for organizations to buy off of state contracts, saving time and money. Wolfe is working to ensure it also makes it easier to buy and track greener purchases.
- Wolfe is also revamping the Massachusetts EPP Program’s website, refreshing the information and making the valuable green purchasing resources easier to find.
- She is also busy looking for ways to integrate environmental considerations into additional contracts.
- Deegler has great faith that Wolfe and the rest of the team will continue to grow and expand the program’s influence and success.

**HOW THINGS HAVE CHANGED**

Asked to reflect on those earlier days and how things have changed over the years, Deegler recounts with a smile how far Massachusetts has come since the initial days trying to promote recycled content paper.

“Recycled paper in the minds of many people had little chunks of leaves in it and was only good for stationery at best. It was nothing you would want to put in your copiers. But through persistence and bringing industry and purchasers together to create a quality product that was affordable and would work well, we made progress. The prices came down and, for almost 20 years, Massachusetts buys recycled content copy paper. We’ve seen this story with lots of products – green cleaners, green computers, green cars, plastic lumber, energy efficient lighting, green buildings, and more. It’s amazing what government purchasing can accomplish.”

Going forward, Deegler plans to refocus some of her green purchasing attention on consumer-level products. She says, “My daughters and their young parent friends are always asking what type of baby shampoo should I buy, what foods need to be organic and what materials in toys should I avoid. There is good information out there, but sometimes it needs to be made even more easily accessible on local levels for interested buyers. For me, it’s all about the generation of my kids and their kids now. I hope I can continue to help.”

On behalf of government purchasers everywhere, thank you, Marcia Deegler, for showing the world what government purchasers can accomplish and for making green purchasing a little easier for everyone. <
Faced with an adverse legal decision and skyrocketing benefits costs, Orange County, Calif., is pushing hard to reduce its pension and healthcare expenditures that have continued to rise, despite declining revenues, in recent years.

Employees now share in the contributions to their pension plans, pick up more of their healthcare expenses and hold slim prospects for an increase in wages or even small adjustments to keep up with inflation.

“If there was a truck full of money that backed up into the county, we would be the first to go to our employees and say, ‘Here it is, go for it,’” says Steve Danley, the county’s director of human resources. “But our financial situation is not such that we can do that.”

Instead, Danley says, he is bargaining with unions to find savings, so the county can manage its employee costs, particularly those for pensions and health care, and repay the state following a $150 million loss in a court case related to school funding. “Our pension and health care costs have increased dramatically,” he says.

Governments of all sizes are taking a strategic view of their human resource operations to assess how they can fulfill their mission in an era when cutbacks in pensions, wages, benefits and personnel have fundamentally changed the workplace.

New laws, court decisions and economics since the 2008 recession have combined to forge a new reality that is vastly different from the world of ample pension plans and rich healthcare benefits that were once the trademark of public sector employment. Now, governments seek innovations that will motivate their employees, control costs and keep them competitive in the hunt for the right people in an increasingly technical world.

“If employers aren’t doing a strategic assessment, they should be thinking about doing it,” says Julie Stich, director of research of the International Federation of Employee Benefit Plans, based in Brookfield, Wis. “There have been so many changes.”

Cities and counties around the nation have assessed their workforces and initiated changes to embrace the new environment. For example:
- Coconino County, Ariz., allows its 1,200 employees to job share, phase into retirement and purchase up to 10 personal days a year;
- The California Public Employees Retirement System, known as Calpers, has adopted a healthcare payment policy for some public employees that fixes a pre-set cost for a given medical procedure that a group of hospitals has agreed to accept;
- Elgin, Ill., laid off 80 employees, and its unions made concessions in their compensation and benefits, but the city doubled the budget for employee education and training and for improved technology;
- The City and County of San Francisco offer telecommuting and leave policies and allow retirees to be hired for short-term projects;
- Atlanta, Ga., which in 2010 had only half the necessary assets to meet its pension obligations and was spending 20 percent of its budget on pensions, put in place a new retirement plan that requires employees to contribute an additional 5 percent of their wages to the city pension system. The plan also reduces the cost of living adjustment for future employees to 1 percent. Most future city employees will receive a much smaller pension and be placed in a 401(k) style plan;
- Carlsbad, Calif., did away with automatic step increases for years of service and placed the savings in a pool for merit increases.
PENSION AND HEALTH CARE CUTBACKS

While the political argument remains heated in the background, local government officials are working every day to contain costs within budgets that are stretched thin, with little public appetite for tax increases or a reduction in essential services.

“The level of change in the public sector is unprecedented,” says Elizabeth Kellar, the chief executive of the Center for State and Local Government Excellence (SLGE), a Washington-based research organization. “It is one of the most significant challenges for government leaders going forward.”

Cathie Eitelberg, the national public sector market director for The Segal Group, a national benefits and human resources consulting company, says governments have to make a comprehensive assessment of their HR operation. “Every entity is different,” she says. “It’s a strategic process. And there’s no one right answer. Each just has to go through it and figure out what it needs to focus on to deliver services to their constituency.”

Local governments have lopped off 3.5 percent of the public sector workforce from peak employment in 2008. Governments employ about 6.3 million workers today, excluding education, according to SLGE and government statistics. In addition, SLGE found that the workforce has aged, from an average age of 40 in 1992 to 45 in 2012, as more workers decided against retiring during hard economic times. In its annual Workforce Trends survey, SLGE found that 60 percent of governments say their workforce is smaller today than in 2008.

At the same time, local and state governments made significant changes to benefit programs in the years since the onset of the Great Recession, which exposed huge gaps between the promises that had been made to employees and the employers’ ability to fulfill them.

The most obvious difficulties arose in the public sector pension system, which held $2.8 trillion in assets in 2012, covering 15 million working members (about 11 percent of the nation’s workforce) and providing regular benefits to 8 million annuitants, according to Alicia Munnell, the director the Center for Retirement Research (CRR) at Boston College.

According to the National Association of State Retirement Administrators, 48 states enacted major changes in state retirement plans for many groups of employees from 2007-2014, including:

> suspending or lowering cost-of-living adjustments,
> increasing employee contributions,
> reducing benefits for new hires and
> changing defined benefit plans (where the employer has the risk for delivering the benefit) to hybrid plans that contain some element of a defined contribution plan (where the employee is responsible for the final benefit.)

These changes have improved the prospects for state and local pension plans, according to Munnell’s statistics. It notes that the aggregated state and local plans should be back to a solid 80 percent funding by 2015, notwithstanding a crisis, such as a stock market crash. That aggregate ratio had fallen as low as 75 percent in 2011, according to CRR. While the overall picture has improved, the finances still vary widely from plan to plan, with 14 localities declaring bankruptcy in the past five years, often to shed their pension obligations, and
plans in other entities with funding levels near 50 percent.

Widespread cutbacks have also been seen in the area of health care, with 52 percent of employers in the SLGE study responding that they have shifted more health care costs from the employer to employee, in areas such as higher premiums, co-payments and deductibles. While health care inflation has slowed in the past two years compared to the regular increases of 8 to 10 percent several years ago, no one knows if those kinds of devastating hikes will return. In addition, certain provisions of the Affordable Care Act will penalize employers whose plans do not do enough to control costs.

**BENEFIT REDUCTIONS DECREASE JOB APPEAL**

As a result, employers are trimming benefits, and those reductions are having a negative impact on the workforce in communities around the country, according to the SLGE survey. About 70 percent of the employers cited employee morale as an important issue for their organization. And the number of positions that employers say they have a hard time filling has grown, ranging from dispatchers and seasonal pool employees to attorneys, engineers and first responders, while the pace of retirements has accelerated in the last two years, after slowing down in the first years of the recession.

“It’s surprising how difficult it is to hire certain skill sets,” says Kellar. “We see the list growing every year.”

Although Linn County, Iowa does a good job of marketing itself as a desirable place to work, the county, like all governments, has to fight a generally negative perception about public service, says Supervisor Linda Langston, a Board of Supervisors member.

“When I go to nearby universities to talk to potential graduates in public administration, I always ask who is going to work in the public sector,” she says. “No one raises their hand.”

Langston, who also is currently serving as the president of the Washington-based National Association of Counties (NACo), says that employees still like working for Linn County, despite seeing health care premiums triple, with large increases in deductables in the last 11 years. “It’s increasingly become a sticking point in negotiations,” she says. “It’s more and more of a problem.”

And she hears the problem also in her work with NACo. “On the national level, people are talking about it all of the time,” she says. “People want more information so they can sort this out.”

She also sees big changes coming in the area of pensions, which she calls “a tsunami wave,” as more governments move from defined benefit to defined contribution plans. An area of concern, she says, is assisting employees who now must assume more responsibility for their retirement. “This is a broad, complex area,” she says. “I’m not sure officials understand the challenges they will confront in the next eight to 10 years.”

Since governments can only offer small wage increases in the near future while more healthcare cost shifting is likely, officials try to be creative in improving the overall workplace, she says. “We do surveys, trying to see what are the best plans we can offer,” she says.

And she believes that the unions serve a valid purpose on behalf of the employees, though they put up tough

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**Government benefits: the partisan divide**

Opinions vary widely between unions and taxpayer groups.

Not surprisingly, while employers try to find their way through the employee benefits thicket, partisans on both sides of the divide have strong opinions on who is responsible for the current landscape and what actions should be taken to meet revenue losses and increasing expenses.

Kris Vosburgh, executive director of the Howard Jarvis Taxpayers Association, based in Los Angeles, says that more cuts are needed because taxpayers cannot afford to pay for the compensation that public sector unions have negotiated. “The high costs hit disproportionately hard on the poorest in the community,” he says. “Unions have no hesitancy about throwing the poor under the bus to protect their employees.”

Barry Broad, a union lobbyist based in Sacramento, Calif., scoffs at the contention that the concerted effort to reduce public sector benefits is based on concern for the poor, but argues instead that it is an ideological crusade by the rich, cynically exploiting the fears of the poor.

“There’s no question that they are trying to claw back these benefits,” he says. “We resist the best we can against the politics of envy.”

At a 2013 conference on the future of retirement plans, Steven Kreisberg, director of collective bargaining for the American Federation of State, County and Municipal Employees (AFSCME), the largest union in the public sector, was indignant about the cutbacks in pensions.

“They don’t have the ability to reach into a bank account and take away your money,” he says, “but it’s OK to reach into a retirement benefit. How do you break promises to people?”

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**IN DEPTH [benefits]**

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fights during negotiations on sensitive issues. “We try to tell the unions that world has changed,” she says, “but they are living in a world that existed 30 or 40 years ago. Cogs are moving at different rates of speed.”

### ADDING CONTRACTORS RATHER THAN EMPLOYEES

In Rancho Cordova, Calif., outside Sacramento, the city of 67,000 residents has more contractors for its services (90) than it has full-time employees (68), says Stacy Peterson, the HR manager. “It gives us flexibility to reduce contracted services when development is down,” she says.

The city has private companies maintaining roads as well as providing city planners and inspectors, she says. Many of the contract employees have served the city for five or even 10 years, but their employers handle all of their pay and benefits.

Although much of the workforce is not employed by the city, it makes an effort to include contract workers in city planning task forces and community volunteer efforts. “We take extra steps to incorporate them with the workforce,” she says.

The city takes pride in its designations on various “best of” lists, she says. “We have a very highly engaged workforce. Employees want to come to work. We’re able to recruit top talent.”

### ADDING WELLNESS PROGRAMS TO SAVE MONEY

At the Capital Metropolitan Transit Authority in Austin, Texas, the human resources department estimates that it has saved $4.5 million through its wellness programs. The programs were designed to control healthcare costs that were soaring 10 to 15 percent per year, says Michael Nyren, the agency’s risk manager. “It was threatening the overall operation of the agency,” he says.

The sedentary nature of driving buses, high incidence of smoking, an average age approaching 50 and rampant diabetes all combined to create “a slew of challenges to change the attitude and approach to health,” he says. “We wanted them thinking about health and nutrition.”

Taking a comprehensive approach, the agency launched many initiatives, including promoting its fitness center, changing the food in the vending machines and giving cash incentives to quit smoking. “You have to spend money to save money,” he says. “But the costs were small compared to what we saved.”

A new challenge is the imminent conversion of the workforce from agency employees to contract status, as part of a cost-saving effort that could reduce costs by $35.5 million over seven years. “We’re trying to find a way to track healthcare costs,” he says, noting that some of the cost information will be proprietary among the competing contractors. “The goal is to find a way to measure the impact; it’s critical to what we do.”

In Orange County, Danley says that the cuts have not diminished the supply of candidates for openings in the county, partly because the long driving distances in Southern California make the local job market especially attractive. “We’re still getting tons of applications,” he says.

Comparatively, he notes, the pension benefits in the county are still better than in the private sector. “Even with the reduced pension, people come knocking on the door,” he says. “Maybe you can’t retire at 55, and have to wait until you’re 62, but after 30 years, you get a full pension walking out the door.”

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**Robert Barkin** is a Bethesda, Md.-based freelance writer. This article was originally published in *American City and County*, a sister publication of *Government Procurement*. 

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Best Regards,

Bill
My heroes have always been buyers

We all have our heroes. When I was a kid, one of my biggest heroes was Gale Sayers, the Hall of Fame running back for the Chicago Bears. I still consider him the best of all time, and if not for a knee injury, he may have set every record in the book. He wore number 40 and once scored six touchdowns in a single game.

While I tried to emulate my hero by playing football myself, the fact that I ran the 40-yard dash in just under an hour limited my options on the field. So instead of the National Football League, I ended up in a different professional association: the National Institute of Governmental Purchasing (NIGP).

My experiences in the public procurement field and with NIGP have given me the opportunity to gain a different set of heroes. I would like to share some of them with our Government Procurement readers.

One of the great characters in this profession is Fred Marks. A retired procurement official from the Port Authority of New York, he has given back to the profession in countless ways. Fred has served on educational committees, taught procurement courses, and written many articles for this publication and others. Last year I was teaching a night class at our university, Governmental Procurement, ISQA-440. The fact that Fred agreed to give a guest lecture is not that significant. However, he did so from his Long Island home at 10:30 p.m. Eastern time. That, my friends, is commitment.

Norma Hall is a collaborative leader that has demonstrated her value to the State of South Carolina, NIGP, and the Universal Public Purchasing Certification Council. She is fair, compassionate and diligent, and cares more about public procurement than anybody I know. I served as her vice president when she was leading NIGP, and learned a great deal from her. It takes the quality and commitment of people like Norma to keep advancing this profession. My suggestion is that we clone her and place her in the other 49 states.

Many of the wonderful people I have met in my career come from outside of the United States, including Professor Guy Callender. He hails from Perth, Western Australia, where he has served as the Chair in Strategic Procurement for the University of Technology. It is common to see university chairs in business, systems science or urban affairs, but fairly rare to have one in strategic procurement. Guy has written more books, articles and journals than I can list in this column, but safe to say he is one of the most widely published procurement experts in the world. I have been privileged to work with him on several projects, including our first issue of the Journal of Public Procurement. He’s a professor that can give a lecture to room full of PhDs and CPPOs, and then go to the lounge and lead a chorus of “Tie Me Kangaroo Down” with the locals.

There are many other professionals in the public procurement arena that are also heroes. I have mentioned just a few here, but there are countless colleagues I could tell you about who have helped me in my career.

No doubt each of you has your own set of heroes. Take a moment to consider those who have inspired you in public procurement. Who are your heroes?
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