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PLUS:

**Heroic Procurement
Response
COVID-19 and Energy
What Does It Mean
to Be Green?**

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NIGP launched our Certified Procurement Professional certification in early 2020. The certification is designed for mid to senior level procurement professionals and it opened the doors to thousands of public procurement professionals to continue their growth and development.

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On Anxiety and Depression

Stephen B. Gordon, PhD, FNIGP, CPPO

The webinar that Norma Hall, Darin Matthews, and I presented in September 2020 on “Dealing with Anxiety and Depression” was among the most meaningful learning events each of us has facilitated during our careers. And, the three of us have facilitated a lot of seminars, conference sessions, and webinars. The completed evaluation forms indicated the webinar also was helpful to those of you who attended. The results of the evaluation and the fact that more than 440 of you showed up for the event speak loudly of the relevance of the topic.

Here are the evaluation survey results for the question, “Based on this presentation, how confident are you in your skills and abilities to be able to” do five things that were listed.

- Nearly 99 percent of the attendees said they felt “confident” they could “explain why it is essential to recognize that frequently-occurring anxiety and severe and prolonged depression must be taken seriously.”
- Between 97 percent and 98 percent indicated they were “confident” (80 percent) or “somewhat confident” (17.5 percent) discussing “how frequently-occurring anxiety and severe and prolonged depression can manifest themselves.”
- Close to 99 percent reported they felt “confident” (77.5 percent) or “somewhat confident” (21.25 percent) they could “identify where individuals who struggle with frequently-occurring anxiety and prolonged depression can obtain assistance and support.”
- Barely short of 99 percent said they were comfortable (75 percent) or “somewhat comfortable” (23.75 percent) they could “apply what [was] learned in this webinar to help [themselves] and others.”
- Even closer to 99 percent said they were “confident” (70.51 percent) or “somewhat confident” (28.21 percent)

Talking openly about our own personal experiences in dealing with anxiety and depression was not easy for Darin, Norma, or me; but we hope it served several purposes. One of those purposes was to demonstrate that anyone can experience anxiety and depression, either directly or indirectly. Another was to show the attendees how essential it is for them to reach out for support should they find themselves struggling with anxiety and depression, and to encourage others who are struggling with those disorders.

If you were not able to attend the webinar, you can listen to a recording of it on the NIGP website. If, after having attending the webinar live or recorded, you believe this topic would be a good focus for a chapter or other organization to which you belong, consider assembling your own panel of members to discuss their experiences dealing with anxiety and depression.

STEPHEN B. Gordon, PhD, FNIGP, CPPO, is a longtime veteran of the public procurement arena. His primary focus in retirement is on helping those who struggle with loneliness, anxiety, and depression.



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Every single day, with every effort we make at NIGP our focus is on our mission, to develop, support and promote our members and the work that you do.

The COVID-19 pandemic has shone a brighter light on that work, and how important it is for the smooth functioning of all the communities and entities you serve. Whether that's a small township or a major metro area, a school system or a hospital network and the many other entities that provide all the vital services to keeping us all healthy, safe and able to cope with the vast challenges we are facing.

Sourcewell has been a great partner and continuing supporter of NIGP's mission and a champion of the work that we do on behalf of our members and the profession at large.

We are immensely grateful for their generous financial support of the NIGP Scholarship Program. The program will ensure our organization continues to provide the learning and development opportunities that enable our members to be more effective in the work that you do.

HEROIC: MASSACHUSETTS' PROCUREMENT RESPONSE TO THE PANDEMIC CRISIS

By David Yarkin

> **W**e all know the gruesome numbers that detail the coronavirus' devastating impact on the United States. As of late October, 220,000 Americans had died and more than 8 million had been infected by the disease. The numbers – and the individual stories behind them – are heartbreaking. Those numbers would have been even worse if it were not for two sets of heroes. The doctors and nurses treating COVID patients get tremendous and well-earned credit for their bravery, putting their lives on the line to save the lives of strangers. But standing right behind those medical workers was a much less heralded, but equally impactful set of heroes who did extraordinary things during the pandemic: the public procurement professionals in federal, state and local government.

I had the good fortune to sit down (via Zoom) with Gary Lambert, Assistant Secretary for Operational Services and the top procurement official from the Commonwealth of Massachusetts. His story is like the dozens I have heard since March where procurement officials showed incredible ingenuity, creativity, dedication, and teamwork to save the lives of frontline workers in health care facilities.

There was little that Lambert had not seen in state government. His career working for the Commonwealth began in the early 1980s. After a series of promotions, he ran procurement operations in the Operational Services Division (OSD) from 1991 to 1999. After a dozen years consulting with governments for a major technology company, he



returned to government service at OSD in 2011 where he has served as state CPO ever since. The understanding about state government and the relationships he built in decades of service would figure prominently in Lambert's and OSD's success story.

COVID-19 announced itself in Massachusetts in a serious way with the Biogen conference held in Boston in late February. Perhaps the first super spreader event in the US, the gathering made national news as nearly 100 attendees became sick. By mid-March, as state employees began working remotely and people began being isolated, Lambert recalled that, "given the speed of all of this, we knew we had some issues to deal with pretty quickly."

It was apparent from day one that significant supplies of personal protective equipment (PPE) would be required to keep medical workers safe. It was also clear early on that this would be the procurement challenge of a lifetime for Lambert, OSD and government buyers across the world. "You could see it when you were doing the initial orders. Things weren't coming in 24 or 48 hours like they normally were," said Lambert. The supply chains of Fortune 100 companies that supplied the Commonwealth were breaking. They were unable to deliver the lifesaving gowns, masks and gloves. "You start coupling that with demand and say, 'How are we going to deal with this? Where are we going to find this stuff'" if major distributors themselves were unable to acquire it.

While traditional suppliers were unable to provide PPE, new suppliers were coming out of the woodwork. "The flood gates opened up," said Lambert. "Anybody and everybody who thought that they had PPE was knocking on your door, sending you an email, reaching out through various channels," trying to sell PPE to the state. Years of working in government procurement taught buyers to set up contracts through a formal, competitive process, to look for the lowest cost solutions and to only pay after delivery. But with lives on the line and the clock ticking, Lambert had to re-write the playbook.

"One of the things we did almost immediately is we said we are going to have to change the way we are going to do this buying. The conditions are so different. So, we notified everyone that we were doing that. And we set up a three-tier structure." The first was statewide contract holders who sold medical supplies. If these providers did not have PPE available, the second tier was statewide suppliers on non-medical contracts. And like most governments this year, OSD relied on a third tier of suppliers who held no state contract at all, but who buyers felt could provide the state with quality products in a reasonable amount of time. With the third tier, OSD set up simple contracts through purchase orders and bought as much as they could.

Eventually, Lambert and his colleagues recognized that to meet the seemingly unending demands for PPE they would have to turn to China. Leaders from all walks of life across the state stepped forward to help. Executives from companies like Bain Capital and others made introductions to business executives in Asia. The state's congressional delegation facilitated discussions. The governor engaged with the Chinese consulate. Every stone that could be turned over was turned over to gain entry to China's manufacturing market.

The Commonwealth assembled a team of supply chain, manufacturing, logistics and legal executives on the ground in China. OSD secured the services of an aggregator who had the right licenses to export medical products, helped them identify where the products were, secured the products and got them onto trucks waiting outside the factories. But getting the PPE onto trucks was only half the battle.

"Another new business for us quickly came to the fore, which was how do you actually rent cargo planes? And how do you get the logistics services that you need to get it from the factory to the airport, through customs, onto the plane to get to the United States," Lambert asked rhetorically.

Governments learned that speed would be the most important attribute in sourcing PPE. "The aggregator might identify that there are 4 million masks at this factory [which is a] 20-hour drive away from Shanghai airport. But unless you got there in time to buy those 4 million masks, they were gone and then the quest was on to find them somewhere else. You had to be really fast. You had to be really nimble." The team convened a nightly 8:00 pm ET call with the aggregator, trucking firm, cargo plane operator and lawyer to make sure nothing slipped through the cracks and to respond quickly to any changes on the ground. The pressure was intense. "We had to move fast because we were going to lose stuff if we didn't secure it. And even if we did secure it, you couldn't really just leave it sitting around because you really needed it back here." Compounding the time pressure, Chinese airports were getting backed up with so many planes that each aircraft could only stay for a short period of time before it was forced to leave the airport. Empty planes whose customers didn't fill them with cargo fast returned to their home countries with nothing.

Against all these pressures and challenges, the team at OSD succeeded by any measure. "In the course of basically eight weeks, we went from wondering how we were going to get stuff to actually flying in six and a half flights, which totaled just under 8 million pieces of PPE... It was just phenomenal that we were able to get all of the right pieces in place to get all of that done so quickly," Lambert said.

HOTTOPICS [heroes]

While COVID-19 was the worst crisis that any of us have ever lived through, public health officials warn that other pandemics could arise in coming years. What were the key lessons learned that were vital to Massachusetts' success in Lambert's opinion:

- > In a crisis, procurement should not just be a contracting function, but also a purchasing organization, placing orders for those on the front lines
- > Create a multi-disciplinary team so procurement has experts it can rely on for information and a group of agency leaders who can assist with the non-procurement elements of a response
- > Build some expertise on your team about "how the commercial world works"
- > Establish contracts and relationships before a crisis with aggregators in Asia or Europe who can assist in securing products from markets your team does not know as well

But perhaps the most important lesson that a purchasing professional can learn from the Massachusetts experience is that leadership is about celebrating your teammates' successes rather than your own. As our nearly hourlong conversation came to an end, Lambert praised his colleagues for their central role in the effort. "It was heartwarming to

see how so many people stepped up and really put in a ton of extra effort and energy. And not only that, the passion behind it, both in OSD, in the Emergency Management Agency, command center, governor's office to make it work. These are people who just said, 'What do you need? How can I help?' And that was what really made this work. I happen to be one of the people in the middle of it, but it was really the group," Lambert humbly concluded.

David Yarkin is the former Chief Procurement Officer of the Commonwealth of Pennsylvania and a nationally recognized expert on procurement innovation in the public sector. David is the CEO of Procurated, a supplier ratings and review platform for government and the President of Government Sourcing Solutions, a supply chain consulting firm that has worked with 34 states and many large municipalities since its founding 15 years ago.

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COVID-19 AND ENERGY: THE CRITICAL NEED FOR EXPERT ADVICE

By Bob Wooten

When the history books are written, the storyline for the chapter on 2020 will be the Great Pandemic and the effects of COVID-19 on the economy, lives, and society in general. A key aspect of this impact on our lives has to do with usage, supply, and cost of energy. While energy usage went down among businesses, it rose at home as more employees began working remotely. This lowered commercial demand for energy led to a supply/demand imbalance that lowered energy prices.

All of these factors combined to create challenges for procurement professionals in managing their organizations' energy needs while procuring energy supply in a manner that doesn't lead to potential fees and penalties.

Many organizations have been able to take advantage of lower energy prices to secure savings and stabilize budgets now and in the future. The key to preparation lies in understanding the energy markets. Because of the increasing complexity in our

global situation, more and more entities have turned to expert energy help to assist in this undertaking.

When engaging a quality energy advisor, there are several critical areas to evaluate:

- > Experience
- > Wholesale Market Expertise
- > Strategic Approach
- > Independence

THE VALUE OF EXPERIENCE

How many times, as a procurement professional, have you heard vendors pitching their goods/services (regardless of the industry or the commodity) claim they are “experienced”?

When considering experience, it is not just the number of years in the industry (quantity), but it is the quality of those years. Tenure in the industry is certainly important, but your decision should never be as simple as hiring the guy with more years of experience.

- > A more accurate summary of experience would include a whole host of items in addition to how long it’s been a viable company:
- > Company background: what are the major milestones and accomplishments?
- > Organizational structure: how will the business operations support our needs?
- > Management team: does solid leadership drive the company forward?
- > Uniqueness/strengths: why should we choose them over the competition?
- > Geographic reach: can they address issues for all of our locations?
- > Client numbers, load managed, client types, references, case studies: do they employ best practices, and can they handle our needs?
- > Number of vetted suppliers: do they work with all the major suppliers in the marketplace?
- > Client retention/satisfaction: does this business have a track record of success with customer support?
- > Financials: can this company prove their fiscal strength and endurance?
- > Results, awards: what is the tangible evidence of this company’s “experience?”

When you are evaluating an advisory firm’s experience, don’t just ask, “How many years?” As we’ve illustrated, there is much more at play. The goal is to choose an advisor who can truly strategize and create a customized solution that will bring value to you, the client, for years to come. In discussing energy policy and how the markets may affect budgets, your truly “experienced” advisor will become a trusted team member on whom your organization will come to rely.

The strategic approach is, at heart, a holistic solution.

WHOLESALE MARKET INTELLIGENCE

When it comes to procuring energy, it is all about incorporating “wholesale market knowledge” into the process that leads to significant budget savings. The cost you pay as a consumer is directly related to the price your retail supplier pays for this energy in the wholesale market. As with any other commodity or product that falls under your jurisdiction as a procurement specialist, if you understand what that wholesale number is and why the price is set where it is, you will be much better prepared to negotiate the right price.

When selecting an energy advisor, you want to partner with one who has first-hand knowledge of the wholesale market. This intimate intelligence helps you see the “color” of the market: You’ll find out not just what the numbers are, but who is transacting and – perhaps most importantly – why they are making their moves. As a consumer, you can then better understand if the wholesale prices are moving up or down, short-term or long-term. Translated properly, this puts you in a stronger position to find those dips in the market that allow you to secure low rates over a longer period of time.

If you incorporate this concept into your evaluation and selection process when engaging an energy advisor, you will definitely be on the right track.

TAKING A STRATEGIC APPROACH TO RISK MANAGEMENT

A strategic or “advisory” approach looks at a host of issues to bring multiple solutions and opportunities to the table – many of which the client was not previously aware existed. These additional solutions are based on the advisor’s in-depth understanding of the client. An effective advisor will take the time to get to know your organization’s future energy usage patterns, risk tolerance, exposure to the markets where you operate, and other services that intersect with the supply of energy.

The strategic approach is, at heart, a holistic solution. The advisor takes into account a number of factors affecting an organization and its particular energy management situation, including:

- > Procurement of energy in deregulated markets

- > Optimal tariff supply in regulated markets
- > Organizational risk tolerance (aggressive vs. risk-averse)
- > Optimization of load profile
- > Exposure to peak-demand-based utility charges
- > Management of energy usage data and spend
- > Revenue opportunities from energy curtailment programs
- > Organizational challenges to utility bill processing and payment
- > Internal/external sustainability goals

This is by no means an exhaustive list, but it provides a glimpse of all the various elements that a knowledgeable energy advisor will understand and the bare minimum of what they must consider when creating a strategic approach to meeting the client's needs.

The true role of an advisor is to broaden your understanding of the solutions available and how these could fit into your organization's energy procurement goals. The energy landscape continues to change very rapidly. Procuring and managing the energy needs of an organization requires a proactive strategic approach to cover all the bases and reveal

any new opportunities that further address the ongoing or future needs of the organization.

INDEPENDENCE IS KEY

When engaging an energy advisor, it is crucial that the advisor solely represents you and your goals – as opposed to the goals of some third-party affiliated supplier or vendor. Independence is only truly achieved when the energy advisor is not part of a larger energy efficiency company and is not directly affiliated with any particular electricity or natural gas suppliers. When you hire an energy advisor, it is for the express purpose of helping your organization attain the best energy policy to achieve your goals.

A conflict of interest arises when the focus shifts from benefitting the client to benefitting the advisor. This can be the case when working with an advisor who is not independent by virtue of either affiliation or ownership by an energy efficiency or equipment company. When an advisor is both trying to sell you energy-related equipment and help procure energy, both these functions can be at odds when calculating return-on-investment (the ROI is much more attractive if your energy rates are higher).

When choosing an energy advisor, be sure to investigate their affiliations – and steer clear of any that could be questionable. You'll create a more unbiased and transparent relationship when you fully trust that your advisor is focused on managing your procurement needs.

A TRUE ADVOCATE FOR THE CLIENT

You want an energy advisor who sits on your side of the table and evaluates all options in a transparent manner, with your goals in mind. This leads to a valuable long-term relationship with a trusted partner who will guide you through an energy procurement process that best suits your organization – which is the ultimate goal of managing your energy needs.

BOB WOOTEN, C.P.M., CEP, is Director of National Accounts for Tradition Energy, and has over 20 years of experience managing commercial, industrial and governmental procurement programs for a wide variety of clients. Bob 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 Master's Degree in Public Administration from the University of Houston.



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PROCUREMENT'S VALUE: A CALL TO ACTION

By Alex Denis, EdD, CPPO

Today's public sector agencies are facing fiscal constraints unlike anything experienced in decades. As a result, agencies are taking a hard look at how taxpayer-generated funds are allocated across the organization and examining the value derived from every unit. The current economic reality is a call to action to demonstrate the value of procurement.

Agencies at all levels, from large federal agencies to small local governments, are bracing for tough times. Some are projecting that it could be many months or even years before current economic conditions turnaround; most agree that some degree of fiscal belt tightening will be necessary.

As in past economic downturns, agencies are exploring expenditure freezes, budget cuts and personnel reductions to address shortfalls. Some are utilizing zero-based or program budgeting that closely scrutinize how funds are allocated throughout the organization. Regardless of the means, there appears to be a common theme – agencies are asking hard questions about the return on investment organizational units provide for funds allocated.

The projected shortfalls and no-stone-left-untuned budgeting practices being explored at some agencies may result in employees who fear their jobs will be affected. Some procurement employees share these concerns, others do not. What separates those procurement employees that are concerned from those that are not?

However, there is a factor that seems to separate those who are concerned for their jobs from those that are not. During the last economic downturn, a poll found that procurement employees that were not concerned about economic conditions affecting their jobs believed in the value that procurement delivered to their organizations. In fact, some of those polled welcomed the opportunity to demonstrate the value of procurement.

The value of procurement is subjective and varies from organization to organization. One exception may be the universal notion that procurement adds value through its contribution to the bottom line, which helps assure the responsible use of taxpayer-generated resources. However, while important, procurement's value proposition goes far beyond bottom line considerations.

Procurement adds value through awarding private sector contracts, creating jobs and fueling the economy. Procurement also adds value by addressing constituent demands to consider the impact of spend decisions on other considerations, such as small and minority contractors, to help strengthen communities,

or on the environment, to safeguard natural resources.

Through ethics and transparency, procurement adds value by promoting trust for the agency, which some believe is the currency of the public sector. Rather than yielding financial returns, the public sector is measured in degrees of trust, primarily as perceived by constituents, and procurement's role as a trust builder is immeasurable.

However, there has been no time in recent history that has demonstrated the value of procurement more than current COVID-19 pandemic national emergency. In response to the pandemic, procurement teams across the country have stepped up to navigate "the wild, wild west" of personal protective equipment (PPE), as described by California Governor Newsom, and to secure the supplies so desperately needed to protect health care, public safety and government employees, as well as the general public. Procurement teams have stepped up in other ways too.

In Maine, state procurement, amid significant supply and pricing challenges, has brought private and public sectors together to secure more than 1 million N95 masks for front line employees. At the University of Colorado – Boulder, the procurement team leveraged technology to create a simple online way for the university community to get the personal protective equipment it needed. In Miami Beach, the procurement team has been busy working with departments and suppliers, leveraging relationships and negotiation skills, to rebid or renegotiate standing agreements, reporting nearly \$700,000 in savings to date. These accounts are just a few of the many ways in which procurement has been adding value during this time of national emergency.

The current economic reality is challenging every organizational unit to yield the highest degree of value possible for the taxpayer-generated resources with which it has been entrusted. As with prior emergencies and economic downturns, procurement professionals have stepped up and declared, "Challenge accepted!"

It is now incumbent upon every leader in the field to define the value of procurement for his or her agency. Now, more than ever, is the time to heed the call to action to demonstrate that procurement's value proposition is indeed impactful. In doing so, procurement leaders and the teams they lead can be confident that they are delivering maximum value and exceeding the return on investment demanded by their agencies and the tax-paying public.

ALEX DENIS is Director, Procurement Department at the City of Miami Beach, Fla.



Climbing the Ladder

Firefighters in Brainerd, Minn., are keeping residents safer with new equipment and training. Replacing aging equipment takes time, but department leaders speed up the process and secure best pricing with cooperative purchasing. They get the equipment they want with a process they trust through their government partner, Sourcewell.

Watch this video to see how cooperative purchasing is helping fire departments.



http://sourcewell.co/gov_pro_bfd

Sourcewell is your government source for more than 400 cooperative contracts.

sourcewell-mn.gov

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What Does It Mean to Be Green?

AND HOW CAN YOU BE SURE YOU'RE CHOOSING SUSTAINABLE GOODS AND SERVICES?

By Jean Clark

> C OVID-19 may have derailed many public sector projects and forced leaders to reprioritize goals for the 2021 fiscal year, but it didn't tamp sustainability ambitions. In fact, many agencies may be placing an even greater emphasis on the procurement of green goods and services as they strive to reduce the impact of their programs and services on both the planet and public health.

The challenge, of course, is finding a way to achieve green buying goals within the confines of the current fiscal environment. Sustainable products and services tend to have a higher price tag due to the materials, equipment and labor required to carefully manufacture, transport and implement a higher-quality solution. But that doesn't mean that you can't maintain – and even expand – your sustainable procurement practices in the middle of a pandemic and amidst budget cuts. You just need to do three things to make the more responsible choices more cost effective:

- > Clearly categorize products and services certified as greens options
- > Configure policies, processes and procedures to cultivate a sustainable purchasing culture
- > Chronicle both successes and challenges

STEP ONE: KEEP SUSTAINABLE OPTIONS FROM GETTING BURIED

Even before the COVID-19 outbreak began, procurement teams were understaffed and overwhelmed. They had to source supplies and services as quickly as possible, and figuring out which products were “green” was like searching for a needle in a haystack. To be honest, this issue still exists within many agencies today, with the need for speed growing exponentially due to COVID-19's additional procurement burden.

If your state or local government wants to meet its green purchasing goals, it has to make it as easy as possible for buyers to find the environmentally-preferred products available on pre-negotiated contracts and approved catalogs. One of the easiest ways to do that is by tagging products that have been verified by either your team or a third party as meeting your agency's green criteria. This is where a universal commodities classification system such as the NIGP Code becomes very valuable. Many ERP and financial systems don't support green delineations, and the NIGP Code's framework is specifically designed to classify

vendors, products and spend data from a categorical perspective. That's actually why it became the first classification taxonomy to be used by the public sector for green spend tracking over a decade ago.

By setting up a "green" coding structure, you make it easy for the procurement team to find sustainable products and services in a quick sort or filter function. The search becomes even easier if all shoppable catalogs and catalogs are aggregated into a single e-commerce type marketplace solution that clearly articulates the business rules for sustainable purchasing to buyers, enables them to see all options on one screen and features green products at the top as recommended selections.

When determining the best coding structure for your green goals, remember that it may be most beneficial to create both green certified classes and class-items to reflect certified products. This allows for clear delineation of green versus non-green products and services. Five-digit codes beneath that class would reflect the same structure as the original, noncertified products and services.

Of course, there are other options beyond the NIGP Code, such as the creation of an XML-based "green" attributes tag, which would allow you to use your existing NIGP Codes as is. However, few systems support this, and looking at the commodity code and base description, there would be no differentiation between regular and green-certified products. You could also create a code suffix to denote green certified products. But for systems that use a numeric commodity-code numbering schema, the introduction of an alpha character would not be supported without modifications to the systems.

Ultimately, it will be up to you to define what standards are acceptable and what certification entities are recognized by your agency – as certification standards, entities and processes are a moving target from entity to entity.

Your codes are compatible and applicable across all information systems involved in the procure-to-pay process and scalable to support future growth of your sustainable purchasing program and ongoing catalog/contract diversification.

Whatever approach you take to tag green products doesn't become disruptive to existing classification system implementations or your processes.

All eligible vendor offerings are in fact coded – and coded properly. That may take a little work up front, but the resulting time and money saved will be exponentially greater.

STEP TWO: ADAPT PROCESSES AND POLICIES TO SUPPORT MORE RESPONSIBLE PURCHASING

Categorizing and coding green products is like planting a seed in the garden for your sustainable purchasing program. It may grow on its own, but

it would be better supported by the right mix of water, sun and soil nutrients – or, in this case, the right mix of policies, processes and procedures.

Whether you're just now establishing green procurement goals or have a more mature program in place, it's critical to stop and assess your progress and evolving needs in the context of today's climate:

- > What is a green product by our definition?
- > How will we "certify" goods and services as green?
Is there a specific validation process we will manage?
Or will we rely on third-party organizations' ratings?
- > What types of terms and conditions do we need in our contracts to ensure vendors fully comply with our green criteria?
- > What types of policies should be implemented at the state and/or local level to encourage agency prioritization of environmentally-preferred products and services?
- > How will we sift through all of the information in our historical records to benchmark green purchasing practices?
- > What is it going to take to achieve our green goals in a cost-effective manner? What types of goods and services do we need to source?

Once these insights are gathered, you will be better equipped to develop policies, re-engineer processes and refine workflows so that it becomes easy and natural to execute a sustainable purchasing program. It's critical to empower buyers to work with green certified vendors as much as possible. This type of discovery may also help you understand how best to incentivize customers so that they commit to more sustainable purchase requests. Like anything new or unfamiliar, change management is going to be in order.

If you need help with any of these policy, process, procedure and training actions, I recommend that you tap into the expertise and bandwidth of NIGP Consultants. They have years of experience developing, implementing and refining green purchasing programs for the public sector.

SEE HOW THE NEEDLE MOVES

Of course, like any specialized purchasing program, you need to closely assess impact and amend workflows and policies as needed. If you're leveraging the NIGP Code to categorize spend, then you will be able to track progress toward your goal via regular procurement reports and audits within your eProcurement system. Sustainable purchases can be monitored in the scope of all spend or within a more focused lens on specific classes of green products and services.

JEAN CLARK, FNIGP, CPPO, C.P.M., CPM is President of NIGP Code and Consulting Services at Periscope Holdings, Inc. She is an NIGP Past President and former State of Arizona Procurement Administrator.

WHAT TUNE WILL YOU PLAY?

By Pamela Cotham and Lisa Frank

> **I**n music, there is a compositional structure called the sonata allegro form. A theme, or melody, is introduced, it goes through a development of different keys, the scales around which the music revolves, and re-emerges, always changed having gone through its journey. What does that look like for Procurement? For several years, Procurement has had to do more with less. To an already complicated “tune” came the pandemic, protests over racial

injustice, a conga line of hurricanes, a burning west coast, and other upheaval. The “development” of this song seems only to become more layered and intertwined. On one hand, it’s difficult to process and reflect when one is in the midst of a crisis. On the other, there is no guarantee that we will emerge to clearer times. While submerged in these maelstroms, what are we learning and how can we incorporate our insights to do procurement better?



Procurement may be realized in new ways, but public procurement activities are still based on our pillars of public service, public trust, and justice. Our “why” remains the same. These pillars are verbalized through our values and guiding principles of accountability, ethics, impartiality, professionalism, service, and transparency. They are now incorporated into NIGP’s Pathways curriculum in courses such as Mission & Public Benefit; Ethics, Integrity & Transparency; Social responsibility; Transformation and Vision Creation; Driving Change, Innovation & Agility; Communication Strategies; Problem Solving & Critical Thinking; and Relationship Management.

What has changed and expanded is our perspective, resilience, and resourcefulness. Procurement resilience and resourcefulness were covered in the August-September article. But what of our expanded awareness? According to a July 15, 2020, Washington Post article, “When the pandemic struck in mid-March, American companies cut back sharply on hiring for jobs related to diversity and inclusion...” Two months later, following protests in response and in reaction to the murder of George Floyd, “Diversity & Inclusion postings rose 50 percent in June on Glassdoor, the largest percentage increase over a four-week period since January 2016...”

In 2012, Knoxville’s previous administrator, Mayor Rogero, challenged the Purchasing Department to be more inclusive in its outreach to diverse suppliers. The City also adopted a 3-pronged approach to equity and inclusion, which is being continued by current Mayor Kincannon, and established an equity committee composed of upper management and frontline staff to discuss diversity and inclusion. The Committee is working towards implementing systemic change within the city to improve the environment for employees and their supplier network. The city’s three-pronged approach includes:

- > Departments being intentional with recruitment to create a diverse workforce.
- > Human Resources being intentional in creating programs that make all employees feel comfortable and valued.
- > Stakeholders being intentional to increase supplier diversity.

In 2016, the city intensified its contracting efforts by adding Assistant Purchasing Agent Pamela Cotham to the Small Business and Diversity Outreach Office. Intentionally is key. In her position, Cotham builds

relationships with diverse business enterprises. She works internally with client departments, responding to their needs, e.g., requests for PPE, by providing supplier names and contact information from her database of minority- and women-owned businesses. Cotham also works externally to expand the database, reaching out to the State of Tennessee, Utility Board, Housing Authority, and others for referrals to minority- and women-owned suppliers.

In 2018, the City of Knoxville, in conjunction with East Tennessee Purchasing Association (ETPA), an NIGP chapter, and eight member agencies formed the ETPA Diversity Business Alliance. This alliance consists of The University of Tennessee, Knoxville Utilities Board, Knoxville’s Community Development Corporation, the Public Building Authority, Knox County Government, Metropolitan Knoxville Airport Authority, and the City of Knoxville, and meets monthly to network, collaborate, and share information with the goal of engaging diverse suppliers in the procurement process. This collaboration resulted in the creation of the Diversity Business Expo in March 2019. The expo targeted minority-owned, woman-owned, and small businesses, and invited each agency’s procurement card holders, requisitions, warehouse inventory clerks, and decision makers (rather than procurement officers) to work the booths to facilitate them meeting face-to-face with new diverse suppliers.

We may eventually emerge from these crises or we may be called upon to continue functioning even as we are battered by ever-mounting challenges. As we move forward, we have an opportunity to be intentional, to compose a more resonant song. The City of Knoxville has seen minority-owned business spend increased from \$1.9 Million or 3.05% in FY 12 to \$4.3 Million or 5.71% in FY 20, and from \$4.4 million or 7.03% in woman-owned business spend in FY 12 to \$7.5 million or 9.84% in FY 20. While these results are encouraging, the City plans to expand its outreach to diverse suppliers in the hope that it will continue to increase their participation.

What is your entity doing structurally and systemically to increase participation by diverse suppliers?

PAMELA COTHAM works in the Small Business and Diversity Outreach Office in the City of Knoxville, and Lisa Frank, NIGP Program Content Manager.

IN DEPTH [nigp-cpp certification]

NIGP

NIGP-CPP

**CERTIFIED PROCUREMENT
PROFESSIONAL**

Your Pathway
to Success

Virtually every industry has some form of certification program. After all, it's an effective way for professionals to enhance their expertise and capabilities and show the investment and commitment they have made to their field of work. Moreover, certification helps employers evaluate potential hires while also motivating existing employees by improving their performance and enhancing their skills and competence.

NIGP launched our Certified Procurement Professional certification (NIGP-CPP) in early 2020. The certification is designed for mid to senior level procurement professionals and it opened the doors to thousands of public procurement professionals to continue their growth and development. The NIGP-CPP is based on in-depth industry research and a full assessment of the procurement certification landscape and direct input from our members.

What makes the NIGP-CPP unique is that it assesses candidates on their competence, not just their knowledge. While knowledge is important, it's imperative for individuals to apply that knowledge to real-world situations in their roles for maximum impact.

THIS IS THE ESSENCE OF THE NIGP-CPP.

Our new certification allows practitioners to gain the confidence to go into their roles knowing they have the competence to perform at peak level.

Procurement professionals are public servants entrusted to make decisions in the best interests of the taxpayer. They play a critical role in delivering real, tangible value not only to their entities but to the larger communities they serve. When procurement professionals perform at their best, taxpayers benefit and communities thrive.

According to Don Buffum, NIGP-CPP, Chair of the Commission, "If our actions result in dollar savings, or better services, or more computers in our schools,

"As a proud lifelong learner and 15-year procurement veteran, this exam validates that years of education and experience lead to critical thinking and a more strategic partnership with stakeholders. I could not be more excited or proud to be one of the first to achieve the NIGP-CPP certification, a monumental step towards moving Procurement Professionals from the back office to a seat at the table. Thank you NIGP for seeing the need and making it happen."



Angela Lay, NIGP-CPP, CPPO
Agency Procurement Officer
Fiscal Services Procurement
TN Department of
Commerce & Insurance

or the ability to provide more food and medicine to those in need, then we are doing our part to make our communities a better place for all."

OPENING DOORS

The NIGP-CPP removes barriers by offering six different paths to certification, all based on a mix of formal education and real-world procurement experience. Whether you have a high school diploma, associates, bachelors or more, there's a path towards certification for you.

Pathways A – E of the NIGP-CPP were specifically designed for our "first timers", meaning professionals who are not currently certified as a CPPO or CPPB, while Pathway F was designed for holders of either or both of these certifications. As a Pathway A – E candidate, you may qualify for the NIGP-CPP Comprehensive examination, and as a Pathway F candidate, you may qualify for the NIGP-CPP Bridge examination.

Since launching our first pilot exams in late April 2020, we have awarded over 125 new NIGP-CPP certifications and we have well over 350 additional candidates who are approved for eligibility and planning to take their exams in the months to come. Every day, our certification team is busy fielding questions from prospective candidates and approving new applications. This success is nothing

IN DEPTH [nigp-cpp certification]

more than our members recognizing the value of our new program and the trust they place in NIGP.

By opening the doors to certification, NIGP elevates the profession and improves the competence of our members so they can add greater value to their roles, entities and most importantly, to the communities they live and work in.

PATHWAY A

- > Graduate degree related to public administration, public policy, supply chain, procurement, or economics
- > 2 years (24 months) relevant work experience involved with procurement (public or private, purchaser or seller) within the past 10 years

PATHWAY B

- > Bachelors or higher degree (any discipline) and a graduate level certificate in public administration, public policy, supply chain, or procurement
- > 3 years (36 months) relevant work experience involved with procurement (public or private, purchaser or seller) within the past 10 years

PATHWAY C

- > Bachelors or higher degree (any discipline)
- > 4 years (48 months) relevant work experience involved with procurement (public or private, purchaser or seller) within the past 10 years

PATHWAY D

- > Two-year post-secondary diploma (or) associate degree (any discipline) or a NIGP Public Procurement Associate Designation
- > 6 years (72 months) relevant work experience involved with procurement (public or private, purchaser or seller) within the past 10 years

PATHWAY E

- > No post-secondary diploma
- > 8 years (96 months) relevant work experience involved with procurement (public or private, purchaser or seller) within the past 10 years

PATHWAY F

- > Current CPPO or CPPB or lapsed within one year of expiration date of certification
- > Proof of formal education or relevant work experience is not required

Additional Information - Vignettes:

NIGP-CPP GUIDING PRINCIPLES

The NIGP-CPP was developed by and for public procurement professionals based on the following guiding principles:

- > The NIGP-CPP is perceived as valuable by public procurement professionals, their supervisors and their employing organizations (e.g., district superintendents, finance officers)
- > Employers should be able to use the NIGP-CPP to find qualified employees
- > The NIGP-CPP values competency over years of experience
- > The achievement of the NIGP-CPP must be rigorous and meaningful
- > The NIGP-CPP must be flexible and adaptable to remain current and relevant
- > The NIGP-CPP must be comprehensive of enabling competencies

NIGP-CPP UNIQUE ELEMENTS

There are unique elements to the NIGP-CPP certification and program administration that may help you decide whether the NIGP-CPP program fits your needs and career goals. These include:

- > The NIGP-CPP is targeted to mid to senior level leaders.
- > The NIGP-CPP reflects a holistic view of what mid to senior level leaders do in the performance of their work. It not only includes procurement techniques (like planning, solicitation, contract administration) traditionally covered in other procurement certification programs, but also emphasizes three critical focus areas that lead to success regardless of your specific role: Strategy, Business Principles and Operations, and Leadership (26% of the Module A exam and 72% of the Module B exam).
- > The NIGP-CPP eligibility provides optional pathways for mid to senior level candidates who do not have a post-secondary diploma or a degree but have years of relevant work experience.
- > The NIGP-CPP does not require procurement coursework or training as an eligibility requirement.
- > The NIGP-CPP is a competency-based, modular exam built upon the Public Procurement

“I feel the NIGP-CPP certification helps demonstrate that a procurement professional doesn’t just know the important concepts and values of the profession, but how to practically apply them in real world scenarios to the benefit of their organization.”



Nick Perrera, NIGP-CPP, MPA, CPPO, CPPB
Statewide Procurement Manager
ADOA - State Procurement Office
State of Arizona

“The NIGP certification is inclusive and the content really promotes critical thinking which is essential in our profession.”



Stephanie Dion, NIGP-CPP, CPPB
Strategic Sourcing Specialist
Manitoba Hydro
Winnipeg, MD

Competency Framework (PPCF) and is centered on 43 technical competency statements.

- NIGP’s membership represents a breadth of work experience in procurement, earned in both public and private agencies, serving as both buyers for and sellers to the public sector. The NIGP-CPP recognizes that all this work experience is valuable to the procurement professional. Both public and private sector experience, in both buyer and seller roles, will be considered when determining candidate eligibility.
- NIGP-CPP recertification occurs every three years with a minimum requirement of 36 contact hours of continuing education.

THE NIGP CERTIFICATION COMMISSION AS AN INDEPENDENT AUTHORITY

The NIGP Certification Commission is an autonomous body within the NIGP legal, non-profit structure. The Commission is empowered to take actions in accordance with the expressed authority granted by the NIGP Governing Board. The NIGP Certification Commission

“Our profession is advancing rapidly and every day we’re faced with new challenges to tackle which requires us to evolve. Earning my NIGP-CPP certification has further empowered me with the confidence and expertise I need to drive and deliver results. I would encourage all procurement professionals to seek the NIGP-CPP certification as demonstration of competence, knowledge, and skills to excel as a leader in the procurement profession.”



Travis Pierce, MBA, NIGP-CPP,
CLGPO, CPPO, CPPB
Procurement Department
Raleigh-Durham Airport
Authority, NC

independently makes essential certification decisions related to all NIGP certification schemes. These decisions are made under no influence by any other individual or business entity within or outside of NIGP.

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Testimonial

I knew that if NIGP was creating a new certification, I wanted to be the first to get it. I so appreciate NIGP – it is my trusted professional association. I was personally very excited about the prospect of a new certification. I know that a lot of hard work went into developing this program and it was all well worth the effort, as it has finally become a reality.

I am very proud to be part of the inaugural group of NIGP-CPP recipients. One of the many reasons that I wanted to get it early on was to set an example to my team members and show them that I value this certification. One of my staff members took the exam last week – Jenn Myers, who is also this year's Young Professional of the Year. Another of my teammates took it today – Brandon Morrison, and another one is scheduled to take it in a few weeks – Jeffrey Whiting. I will encourage all my team members to work towards obtaining this certification and support them in any way that I can because I believe that this is a meaningful certification.

I thought the exam was appropriately very hard. By making it appropriately difficult, I walked away from the exam knowing that this certification really means something. Although I would have been disappointed if I hadn't passed, I would have felt ok about it and would have studied harder and tried again. The NIGP-CPP really is a very thorough testing of a person's professional procurement judgment, using a lot of scenario-based questions.

Again, congratulations to NIGP on a job well done with the new NIGP-CPP Certification Program!



Nathan Daou, NIGP-CPP, CPPO, CPPB, C.P.M., A.P.P
City of Tucson Business Services Department

NIGP

The Institute for Public Procurement

New Brand, Same Mission

NIGP has a new look, but our mission remains the same. At our core, we are an organization driven by doing what is right for our members and for the public procurement profession.

Our new positioning, “Elevating the profession, accelerating your performance” perfectly captures our organizational aspirations. Whether it’s the release of Pathways, our innovative learning and recognition program which includes the NIGP-CPP certification, or the move from relying on in-person events and conferences to offering more virtual ones, NIGP is focused on bringing members the right programs, services and educational tools to meet your needs now, and in the years to come.

If you attended Virtual Forum 2020 in August, you may have seen the roll-out of our new brand look, tone and feel. We’ll continue transitioning our outward facing communication touchpoints to reflect this look the remainder of this year. This will include launching a whole new digital experience via the nigp.org website and through our email and social channels.

This has been a true labor of love on the part of the NIGP marketing team collaborating with our Governing Board, Executive Leadership and cross-functional peers. Of course, we also could not have done any of this without our amazing members. So many of you have stepped up to provide us insights and feedback on all our work to get us here.

We are excited to be on this journey of reimagining learning, professional development, recognition and what it means to be a public procurement professional.

The Issues of POs

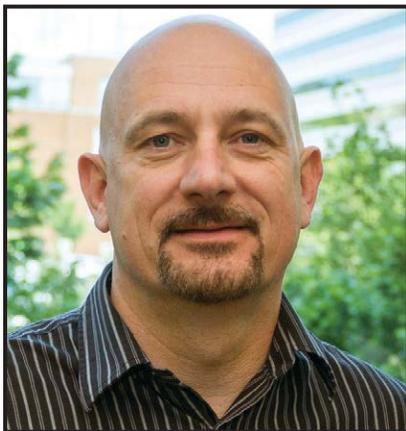
> **A** very common term in our field is PO, and by that we mean a purchase order. If we take a look at the official definition from the NIGP Dictionary of Procurement Terms we see the following: A purchaser's written document to a vendor formalizing all the terms and conditions of a proposed transaction, such as a description of the requested items, delivery schedule, terms of payment, and transportation.

A purchaser order, in many cases, serves as a form of contract. It has all the elements of a binding contract (offer and acceptance, consideration, legality, competency of parties, and mutual consent) wrapped up into a single, signed document. This is the case whether an agency issues a PO on paper or in digital form, which has become more and more common.

A purchaser order, in many cases, serves as a form of contract. It has all the elements of a binding contract wrapped up into a single, signed document.

But "PO" isn't just used for procurement. We see it used for other things in our personal and professional lives. Here are some examples:

- > A military operation might use it to mean Petty Officer, Port Officer or Peace Operations;
- > The technology industry often uses it to refer to a person responsible for a specific software version or a Product Owner;
- > Planning on going old school and mailing a card (or having a separate mailing address), One might use it to mean Post Office;
- > In order to stay on the good side of the corrections industry, it may mean a consultation with your Parole Officer or Probation Officer;
- > The abbreviation has also been used elsewhere in our industry to mean Procurement Officer or Procurement Office.



This is hardly the first time that a procurement related term has been used more than once. How about RFQ? This can refer to a Request for Quotation as well as a Request for Qualifications. The latter has likely been around longer, as it is the procurement method used for Qualifications Based Selection (QBS) at all levels of government. So how did it get reused for an informal (or intermediate) method of buying goods or construction? "Hey, I've got an idea for a quick way to solicit quotes. How about RFQ?" "Um, I think that one is already taken." "Nah. Nobody will even notice!"

Much like other professions, procurement has its own language. While project management may use WBS (work breakdown structure) and RACI (responsible, accountable, consulted, informed matrix), procurement has COI (certificate of insurance) and LD (liquidated damages) to pull out whenever needed.

Walk into a public procurement office and you just might hear "Make sure our CO includes a strong SOW in the RFP, as we want to get a good ROI on the GC we select."

Yes, we tend to use terms in procurement that don't always make sense. But no need to get POed about it.

DARIN MATTHEWS, FNIGP, CPPO, CPSM, is the director of west coast operations for Negometrix, an international leader in digital procurement. He has extensive management experience, speaks throughout the world on procurement issues, and has published several articles and books on procurement and supply chain management. Contact Matthews at darin.matthews@negometrix.com.

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