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> CONTENTS

JUNE/JULY 2020
VOLUME 28, NO. 3

PERSPECTIVES

- 2 Deeper Collaboration

HOT TOPICS

- 4 How Yelp and Angie's List Revolutionized Supplier Performance Evaluation in Government
- 9 Energy Buying Mistakes: Too Many Cooks in the Kitchen
- 14 Conferences: Rethinking the status quo
- 16 How Public Procurement Can Better Prepare for the Next Unpredictable Crisis

IN DEPTH

- 18 NIGP Fourm 2020
Coming to you virtually Aug. 24-28

BACK PAGE

- 24 Darin Matthews:
I, Robot?

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Deeper Collaboration

Stephen B. Gordon, PhD, FNIGP, CPPO

Most state and local government procurement agencies have never had the resources or time to perform their function fully. This historical challenge is spiking as state and local governments move into the “new normal,” where they must operate and deliver services with significantly reduced budgets. No matter how many cost avoidances and efficiencies state and local procurement agencies have achieved for their entities, back-of-the-house functions like procurement likely will remain a lower priority in future budgets. As much as those of us in state and local procurement want to believe that all state and local elected officials and senior managers recognize the strategic value of procurement, is not true across the board. Yet, we do have options.

The increased riding of third-party master agreements facilitated by national and regional “cooperative procurement” groups has markedly freed procurement staff to engage in more value-added activity. However, it has not freed as much capacity as will be needed to sustain and enhance the strategic contribution of state and local procurement in the “new normal.” In the new normal, state and local elected officials, senior managers, and procurement officials will have to consider deeper levels of collaboration such as “true (joint-solicitation) cooperative procurement” and “consolidated procurement.”

Riding national or regional master agreements is a proven successful practice that secures more favorable pricing and frees procurement agencies’ staff capacity for other activities, but it does not offer as many benefits as true cooperative procurement or consolidated procurement. Among the additional benefits of these two deeper forms of intergovernmental collaboration is the ability to leverage committed large-scale buying power to mitigate the possibility of interrupted supply and to assure reasonable pricing during widespread emergencies. Additionally, true cooperative procurement creates more-sizeable cost-avoidances, increases staff efficiencies, and generates all the benefits that accrue from increased sharing of information, ideas, and experiences. In years past, these two arrangements would not have been as practicable, but the technology and the professionalism that now exist in state and local procurement make them viable options now.

Model enabling authority to engage in true cooperative procurement and collaborative procurement has been available since the development of The American Bar Association’s Model Procurement Code for State and Local Governments forty years ago. Does your state or local entity’s procurement code or ordinance contain this enabling authority? Of equal importance, do you, your colleagues, and your senior managers and elected officials have the will to engage in these timelier arrangements.

STEVE GORDON is a longtime veteran of the public procurement arena. His primary focus in retirement is on helping those individuals who struggle with loneliness, anxiety, and depression.



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HOW YELP AND ANGIE'S LIST REVOLUTIONIZED SUPPLIER PERFORMANCE EVALUATION IN GOVERNMENT

By David Yarkin

> **A**s a kid growing up in the 1980s, I watched a lot of television. While the sitcoms were memorable, for me, it was the commercials that I loved. And my favorite one of all was the Reese's Peanut Butter Cups ad simply called "Walkers." An oblivious young man struts down a sidewalk, holding a big candy bar and says, "mmm, chocolate." Rapidly approaching him, listening to a Sony Walkman is an equally oblivious young woman eating peanut butter out of a jar, exclaiming, "mmm, mmm Pea-NUT butter!" Predictably, they collide on the sidewalk and utter the most famous advertising lines of the decade, "You got your chocolate in my peanut butter. You got your peanut butter in my chocolate." Of course, the viewers at home know that when you put these seemingly disparate products together, the result is confectionary perfection.

You may be asking what this has to do with government procurement? Just as a candy bar and

a jar of peanut butter are an unlikely, but ultimately delightful combination, so too are consumer technology and government procurement processes. At first, they may appear to be hopelessly at odds with one another, but when forged together, they are creating a revolution in the way governments select and manage their suppliers. In this article, I will talk about how modern tech and old school procurement have come together, but first some history.

As the chief procurement officer of Pennsylvania, one of the greatest challenges I faced was evaluating the past performance of suppliers who had



responded to the Commonwealth's solicitations. We believed that understanding how a supplier performed for similar governments was vitally important. After all, the best predictor of a supplier's future performance for us was their past performance for other customers. But the Commonwealth, like most governments, had a process that did little to give us insights about a supplier's past performance.

In our RFP process, we asked the supplier for three references. Knowing that we would be giving points based on how well the reference spoke about them, the suppliers had little choice but to send us the three very best references they could find. While on rare occasions, a reference told us something critical about the supplier, the vast majority of references were exceedingly positive and taught us little. In talking with my procurement colleagues across the country,

I heard that some evaluation committees stopped calling references, but instead literally "checked the box" and said they did. And it's hard to blame them, since they knew the likely outcome of the call.

It should come as no surprise to us that great suppliers do great work for customers over and over again. We can predict that a supplier who has consistently exceeded the service level agreements for other customers will perform ably for us. This is especially true if their stellar work was for customer of similar size and complexity and if the work performed was very similar in scope. Conversely, we are right to assume that a supplier whose performance history was littered with major issues, contract disputes, cure letters and terminations is more likely than not going to face performance challenges for us in a new contract. And while these trends are utterly predictable, for decades, they have not been unavoidable. And the consequences have been grave.

A state department of corrections hired a general contractor to build a new, state of the art prison several years ago. Nearly from the start of the project, it was plagued with problems, many of which were caused by the GC. The results were ugly. Two years late in opening, tens of millions of dollars in fines, thousands of construction deficiencies. One would think that this contractor would never be awarded a contract by this state again, given all the problems. But just a few years later, another state agency awarded it a multi-million-dollar contract. And predictably, tragically, major problems ensued early in the project.

Procurement officials know all too well that while they rarely (and sadly) get credit when things go right, they are the first to be blamed when things go wrong. Having led procurement teams, I experienced this myself and it always stings. But in this example, we can't fault the procurement professionals. When the second agency conducted its procurement, it followed the state's process and asked for the standard three references. Of course, the contractor didn't provide the state corrections department, just down the road, because they knew they'd be a negative reference. So the procurement staff could only contact the references provided and make an award based on the official references. They had no way of knowing that their sister agency had had problems with the same vendor.

This story is unfortunately repeated every day across the United States. And just think – if two procurement professionals working for the same government can't find out how a prospective supplier performed for one before making an award, imagine how difficult it must be to find out about an RFP finalist performed for governments in different states or time zones. This vitally important task – learning

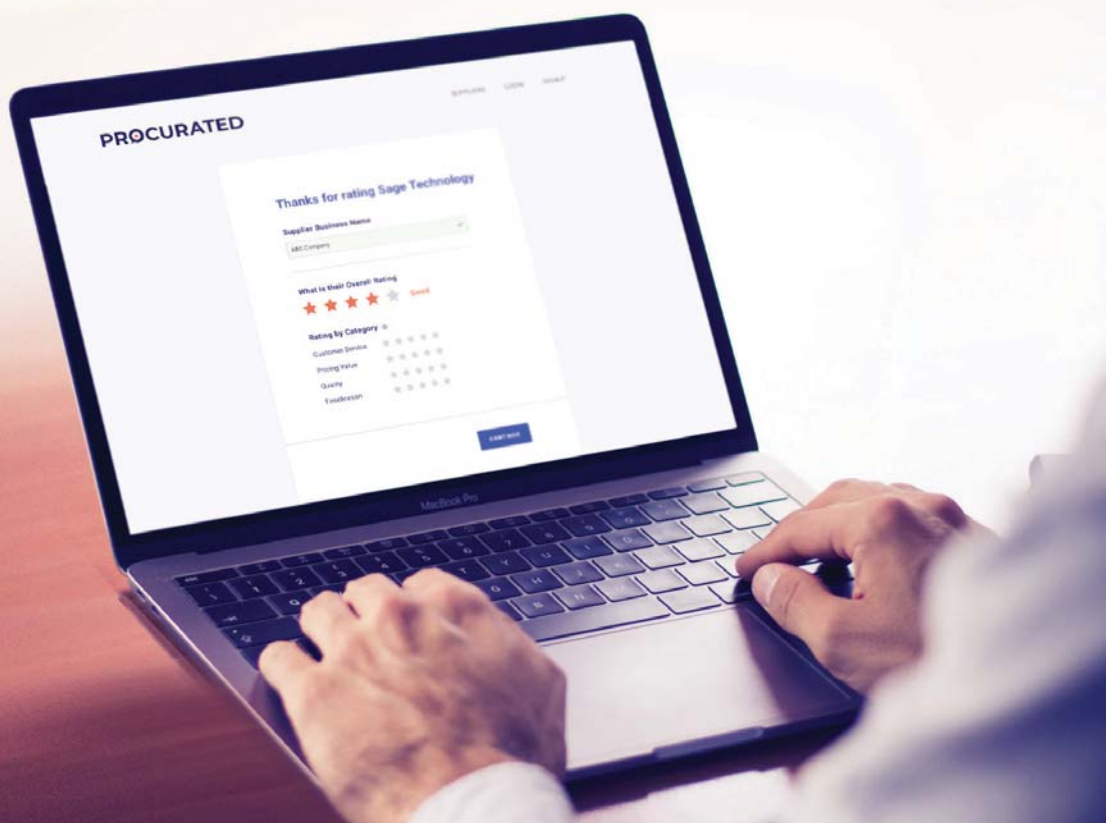
about a supplier's real past performance – has seemed utterly impossible to many of us for years. But just like the young man holding the candy bar, a solution was walking right at us. Only we didn't know it.

In 1979, as I was absorbing commercials in my parents' house, Tim and Nina Zagat were starting a revolution that we now know as crowdsourcing. The Zagats loved restaurants. They had a close group of friends who shared this passion. They decided

that rather than relying on the lengthy reviews written by newspaper food critics (the equivalent to vendor supplied references) they would create a survey about restaurants in New York, have their friends respond and then aggregate those ratings in a thin maroon book they published called the Zagat Survey. The books flew off the shelves of bookstores as diner across New York and eventually the world realized that thousands of fellow diners could give them better advice than two or three food critics.

Separated by fifteen years and 500 miles, a young woman named Angie Hicks used the power of crowdsourcing to solve another challenge, home repair. Angie's boss, Bill Oesterle had just moved to Columbus, Ohio and struggled to find good contractors. He had previously belonged to a group of neighbors in Indiana who shared information about just about everything and he wanted to recreate it in Columbus. He tasked Angie with building a group of homeowners who could inform each other about contractors they had used – good and bad. Angie went door-to-door, literally, talking to anyone who would answer. Eventually, her hard work paid off and she built a list of neighbors who would collaborate together. And it wasn't just any list. It was Angie's List.

While a crowdsourcing tool can be very effective in spreading the word about poor performing suppliers, it is equally effective in sharing stories of successful supplier partnerships.



The peer reviewed crowdsourcing revolution, begun by Tim and Nina Zagat, Bill Oesterle and Angie Hicks, became the mainstay in the American economy by a twenty-something programmer in San Francisco named Jeremy Stoppelman. In 2004, Stoppelman, a former PayPal engineer was felled by the flu and was frustrated that he couldn't find a doctor on the internet. That frustration led to the creation of Yelp which has revolutionized the way that people across the world find the best local businesses. Today, 178 million people across the world go to Yelp before choosing where to eat, shop, work out or conduct other business.

In our personal lives, we as consumers use online ratings and review platforms to help us make the best possible decisions. When we plan trips, we read reviews from thousands of fellow travelers on TripAdvisor before we book a hotel. If we are looking for a new job, we read reviews from dozens of employees on Glassdoor about what it's really like to work there. And of course, we turn to Yelp to hear from fellow diners about the restaurants where we are thinking about eating.

The crowdsourcing revolution that brought us Yelp, TripAdvisor and Glassdoor is not just on its way to public procurement. It's here. Last summer, the Commonwealth of Pennsylvania launched a first-in-the-nation partnership with the ratings and review platform Procurated to help purchasers make better decisions based on peer reviews. Since the early 2000s, Pennsylvania's Department of General Services has established contracts for use by local governments, school districts, universities and non-profits through its COSTARS program. In less than a year, roughly 10,000 reviews have been written about 1500 suppliers. Just as you can look up a restaurant and read reviews on Yelp, governments in Pennsylvania regularly login to Procurated to see what their colleagues across the state are saying about a supplier before they make an award or place an order with them.

While a crowdsourcing tool can be very effective in spreading the word about poor performing suppliers, like

the contractor referenced earlier, it is equally effective in sharing stories of successful supplier partnerships. As the COVID-19 crisis struck, procurement professionals across the country desperately searched for suppliers who could provide them with hard-to-find personal protective equipment. Thanks to the power of crowdsourcing tools like Procurated, procurement professionals were able to tell each other about companies that really came through



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for them, furnishing them with elusive products at reasonable prices, ultimately saving the lives of the medical professionals on the front lines of the crisis. This interstate collaboration will remain vital as our nation continues to battle the coronavirus crisis.

And as our thoughts turn from coronavirus response to the national discussion on inclusion as Americans protested the death of George Floyd, the power of crowdsourcing tools will again manifest itself. Governments across the country will redouble efforts to make the contracting process more inclusive and will try to expand opportunities for minority owned firms. The task of turning that goal into results will fall to procurement officers at the state and local level. On the Procurated platform, purchasers can find minority owned businesses in their communities and solicit them to perform work for their governments. And as they look at contracting with these firms, they can read the positive reviews written by their fellow procurement directors.

The power of this performance data doesn't stop when a new contract is signed. Crowdsourced performance feedback enables government procurement leaders to have data-driven performance conversations with their existing suppliers. Many procurement teams struggle

with vendor performance management because they don't have the tools, technology, or time to facilitate those conversations in a meaningful way. The Procurated platform empowers contract managers to hold vendors accountable and work together to elevate performance.

Government procurement is often labeled, unfairly in my opinion, as being a laggard when it comes to adopting new technology. But by embracing the cutting edge, crowd-sourcing technology used by consumers, it is revolutionizing the way it evaluates vendor past performance. In so doing, we are radically improving the quality of suppliers we are selecting and the service they provide to our citizens.

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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Top 10 Energy Buying Mistakes You Didn't Realize You Were Making (& How to Avoid Them)

MISTAKE NO. 10: TOO MANY COOKS IN THE KITCHEN

By Bob Wooten

This series on the Top 10 energy buying mistakes now reaches its conclusion with a discussion on one of the most common – and yet most challenging – mistakes to overcome. Previous installments covered issues of not procuring proactively, missing the most competitive rates, developing an inappropriate procurement strategy for your specific needs, neglecting a pre-determined procurement goal, utilizing an aggregation for purchasing energy, taking a decentralized approach, hiring one company to handle all energy activities, focusing too much on the process instead of the results, and failing to properly negotiate the key clauses.

In this tenth and final installment, we will deal with an issue that, in some cases, may appear to be beyond your control as the purchasing

professional for your organization. We will discuss the interpersonal interaction that occurs when multiple individuals and departments all vie to take control of the energy procurement process. The solutions to this issue are as customized and varied as the organizations in which they occur. There are, however, some commonalities to both the problem and its solution. In many ways, the concern is as old as society itself – as we wrestle with how best to address having “too many cooks in the kitchen.”

THE MISTAKE: MULTIPLE INDIVIDUALS INVOLVED IN MAKING ENERGY PROCUREMENT DECISIONS

When one individual is responsible for a function or task, it is that person's responsibility to handle it effectively. The task's success or failure

is essentially all up to the one person, as he or she is the sole decision-maker on how to proceed. Energy procurement is no different. When the procurement officer negotiates the most favorable contract terms for the right price, there is success; entering into an unfavorable contract spells failure.

Sometimes, however, the final mistake that stands in the way of success is one that occurs by virtue of the organization itself. Energy is an area of interest and concern for many individuals within a company or organization. As such, these individuals often take not just heavy interest but also some “ownership” in the process of procuring that energy. The complication for the procurement officer is two-fold:

- > You may be able to ensure that you do not make a mistake, but when others are involved, how do you also ensure that they don't make mistakes of their own?
- > In many cases, the interests of all those others involved are then competing – how can you successfully manage this potentially tense and tricky situation?

Some of the results of having more than one person “responsible” for procuring energy include:

- > Differing views on managing risk (such as contract term or fixed vs. index pricing)
- > Failure to follow required procurement laws or policies
- > Waiting too long to actually start procurement (bad market timing)
- > Inaction because all parties can't decide on a direction

WHY IT HAPPENS: LACK OF CENTRALIZED OWNERSHIP

If Party A and Party B both say they are responsible for a process, who is really in charge? Likewise, if both Purchasing and Facilities say that they “own” the process for procuring energy, who is right? These can be hard questions to answer when there are legitimate claims from all sides with regards to managing – and ultimately “owning” – the procurement of energy for the organization.

When you take a step back, it is easy to understand why this confusion regarding who is “in charge” seems to pop up more regarding the procurement of energy than it does for almost any other commodity, product, or service an organization procures. It stems from the fact that, not too many years ago, energy was not formally “procured through negotiation.” It has only been in recent history that electricity and natural gas have become competitive in many markets, meaning it can be sourced from more than one supplier.

The advent of utility deregulation in the late 1990s

Create a strong, transparent, and highly interactive team where all departments that have an interest in the successful supply of energy are on the same page and rowing in the same direction toward the common good.

and early part of this century has taken a process that used to be an afterthought and turned it in to a strategic need. In the past, it may have been someone in Facilities who communicated with the local utility regarding energy supply, but today you have purchasing agents and buyers conducting RFPs and working with energy advisory firms to source energy supply.

This change in process has led to confusion of roles as old ways of managing butt up against the new procedures that are required.

HOW TO FIX IT: CREATE A TEAM APPROACH ADHERING TO THE PROCUREMENT PROCESS

Once you understand the various parties in your organization who should be involved in the procurement process, you must bring them all together. The best way to get all the parties together to accomplish a goal is to create a team. However, a team with no direction and no guidance is sure to fail. So, like any successful team, it must have a strong coach and a commonly understood set of rules to play by.

As long as the team operates in unison, the common mistakes found in procuring energy can be addressed as a group. One particular individual does not fall victim or hijack the process. The rules to play by are the same procurement policies and procedures that you as a purchasing professional adhere to. Being the most familiar with these rules often puts you in the position to operate as “the coach.” This doesn't always have to be the case, but many times it is the purchasing group that manages and guides the process for procuring energy. Once you define the team, identify the coach, and establish the rules, you are ready as an organization to take on the energy

procurement process and deal with the mistake of this final installment in our series head on.

CONCLUSION: DON'T FALL INTO THE SAME OLD TRAP

Now that we have reached the conclusion of our ten-part series on energy procurement mistakes, you may feel well prepared to deal with any and all supply issues as they relate to energy. Let's just go on the assumption that this is the case. You have read and followed the directions regarding the first nine mistakes and how to fix them. Now it is easier to see why fixing mistake number 10 is so important.

Even if you, as your organization's purchasing professional, have now dealt with all the key mistakes, you have no way of knowing if others in your organization have done so. The overwhelming likelihood is that professionals from other departments will be making many of the "Top Ten mistakes" of this series. This means that all the hard work you have done to avoid those can be easily undone, if someone else unwittingly makes the mistake for which you were prepared.

The solution is to create a strong, transparent, and highly interactive team where all departments

that have an interest in the successful supply of energy are on the same page and rowing in the same direction toward the common good. You, as the reader of this series, will then be able to provide guidance for your team, as you learn and grow together. This holistic approach will ensure that the entire organization – not just one individual – truly benefits from fixing any mistakes. By addressing and rectifying these mistakes, nothing should hold you back from successfully meeting the energy supply requirements that enable you to address the real needs of both your constituents and your customers.

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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Crews in Moorhead, Minn., are watching recycling “pick up” substantially after rolling out 16,000 no-sort recycling bins. Residents are recycling five times more than they did in 2017, and are helping Moorhead become a GreenStep City. City leaders procure 96-gallon Toter carts and other equipment by using cooperative contracts through their government partner, Sourcewell, which has hundreds of vendors already on contract.

Watch this video to see blue recycling carts turning a city green.



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CONFERENCES: RETHINKING THE STATUS QUO

By Lisa Frank

> **I**n August 1981, the entire International team at General Electric Information Services (GEISCO) crowded into John Wood's cubicle to gaze, drop-jawed, at the newly unveiled IBM PC. Soon, everyone would be turning away from their typewriters and rushing toward their state-of-the-art computer keyboards. The future had arrived! But, what were our first applications? Why, we dragged our office chairs belly up to the keyboards and began to type! We used these space-age devices to do what we had always done. Granted, for the fastest typists, we no longer had to wait for the carriage return. But, still, all we saw was a sleeker version of what we already knew.

Within a few years, all that was blown out of the water. Coupled with the Internet, the computer age exploded into what innovative thinker and one of the world's leading authorities on the impact of technology on business and society Don Tapscott titles "Paradigm Shift" in his 1993 book and "Digital Economy: Promise and Peril in the Age of Networked Intelligence" in his book the following year. Since then, technology has upended everything we thought we knew and opened up infinite possibilities for innovation and collaboration.

One more point. Sometimes, restrictions imposed on us, whether it be a business challenge or lack of resources, can spur creativity. Some artists intentionally self-impose restrictions. Such was the case with American-British singer David Byrne, founding member, songwriter, and lead singer of the 80's band Talking Heads. In 2004, Byrne

produced a multimedia avant-garde art project using PowerPoint by "turning PowerPoint's bars and lines, stock images and clichéd phrases into his creative playground." (<https://www.npr.org/templates/story/story.php?storyId=1595838>)

Paradoxically, the restrictions of COVID-19 may also be providing us with the next paradigm shift and prodding us into ground-breaking creativity. Associations that previously depended on in-person conferences to both meet their members needs and to generate necessary revenue must find new ways to satisfy those needs. This is the perfect time to apply the procurement professional's tool of value analysis, an organized effort directed at analyzing the functions of a product or service including specifications, standards, practices, and procedures with the intent to satisfy the required function at the lowest possible cost without impacting functional need and suitability. (NIGP online Dictionary 2020)

Let's begin by laying out the functional needs. Why do members attend Forum? Requirements include opportunities to network, bond, learn new practices, deepen our knowledge and experience of one another, benchmark, experience, vent, challenge ourselves, lead, stimulate our minds, become inspired. If we can't network in the grand ballroom or outside on a patio with games and never-ending trays of food and drink, what can we do? What about breakout rooms that participants are randomly placed in that change every 15 minutes while colleagues sit comfortably and safely at home cradling beer, wine, cocktails, or juice boxes



and savor conversation and customized appetizers?

Did you meet someone new and make plans to follow up after the conference? Score a free webinar, textbook, or online class. Watch for the next cloudburst of digital swag! How many of you were able to attend the conference this year because it was virtual? Is it your first Conference? Use breakout rooms to meet with mentors who can advise you on how to get the most out of the conference. How about a benchmarking session? Participants in the session all respond to polling questions on a particular topic, view the results in real time, and then discuss their different laws and approaches.

Want to know your colleagues better? You're invited into their homes, virtually, of course. Meet their families, have their children introduce learning sessions, and provide between-session entertainment. Or share some family rituals with your colleagues. Are there special books you read or songs you sing when it's bedtime for your children? Would you like to tell the story behind a favorite piece of art or a treasured family heirloom? Maybe an association leader would like to share a recipe and actually lead a cooking class, after which you all sit down together to a virtual dinner? Let's find out who members would like to spend time with, hold a conversation with. Let's arrange it!

What about best practices that we can bring

back to our offices? Attend virtual conferences with online chat features to hold dynamic conversations during pre-recorded presentations with time at the end for live Q&A with the presenter? How about an "open house" with informal conversations with experts on topics important to you?

Not ready to call it a day? Visit the all-night Zoom room to hold your person debrief with colleagues. Feel like creative expression? There's a Zoom Marketing room, where you can play reporter or podcaster, or create blogs, articles, poems, or stories.

And what about the keynote speakers? How will conference organizers inspire their members? With travel expense no longer being a concern, we can now engage almost anyone as a keynote speaker. And with technology continually advancing, how can we use 3-D backgrounds and images to amaze and entertain our audience? We can deliver! The question is: When we have opportunities to blast open the lid and create something new, will we take the leap, or will we withdraw to safety and choose to recreate what we already know?

LISA FRANK, NIGP Global Practices Manager, collaborates with public procurement practitioners and academics to conduct research and develop useful guidance on public procurement topics.



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HOW PUBLIC PROCUREMENT CAN BETTER PREPARE FOR THE NEXT UNPREDICTABLE CRISIS

By Jean Clark

> The public sector is rife with emergency response plans. When a hurricane, tornado, snow storm, flood or fire occurs, agencies know how to act fast to protect life and property. However, a pandemic is not a storm – even though the most recent one did seem to create a perfect storm of procurement challenges, especially at the state and local levels.

When a crisis occurs, procurement professionals are some of the first people called into action. Our job is to ensure that response, relief and recovery teams have everything they need to complete their missions without issue or delay. In many cases, this requires us to spend days or weeks in the Emergency Operations Center, focused on understanding the fast-evolving needs of these first and second responders and sourcing the required supplies and equipment.

Even before an emergency strikes, we're the ones working behind the scenes to ensure that front-line public safety, public works and even public health professionals have what they need to quickly and safely respond to citizen aid calls. We are the enabling force of emergency services and recovery efforts.

However, we are only human. The COVID-19

outbreak reminded us of that. Even the best-laid plans for the worst-case scenarios can quickly become obsolete when a public health crisis occurs. Right now, agencies are assessing what they could have done differently to facilitate different outcomes.

Yet, the truth is that it is impossible to fully prepare for the unpredictable. Foresight will never be 20-20, and even hindsight can't completely mitigate a repeat of the challenges that government leaders have faced in recent weeks. Even knowing what we do now about how COVID-19 impacted individuals, communities and economies might not fully prepare us for the next pandemic – or even the next wave of the COVID-19 outbreak. There are just too many variables to these types of equations.

What we can do, though, is continue to adapt our processes, introduce new policies and implement new technology systems that will give us more flexibility and speed in procurement actions.

PUBLIC PROCUREMENT'S HISTORY OF RIGIDITY MAY NOT HELP US IN THE FUTURE

Most people don't typically use the words fast

or agile to describe government operations given the many different regulations with which agencies must comply, particularly when it comes to spending taxpayer dollars. However, ambitious efforts are being made to allow for greater flexibility in procurement processes without decreasing transparency or accountability, and they couldn't come at a better time.

The three biggest pain points identified during COVID-19 related sourcing efforts are:

- > Supply chain limitations
- > Cumbersome procure-to-pay processes
- > Insufficient technology systems, particularly as it relates to supporting a fully-remote workforce

Ironically, the first two issues can easily be addressed by focusing on the third one.

There is no question that procurement policy changes will occur quite quickly in the coming months (if they haven't already) or that processes will be re-engineered to ensure buyers have the means to expedite sourcing actions in future emergency scenarios. But unless swift action is taken to modernize procurement technology systems, there will still be significant execution challenges in contingency contracting environments.

That's because best-of-breed eProcurement systems built purposefully for public sector use afford users an inherent agility that isn't possible with even the latest-generation procurement modules of ERP systems or homegrown eProcurement platforms. They can facilitate a completely automated procure-to-pay workflow that helps to:

- > Expedite sourcing actions without extensive manual intervention required
- > Monitor for compliance and prevents further progress of certain actions that do require manual intervention for review, verification and/or resolution
- > Maintain real-time oversight of every dollar spend and identify wasteful actions or opportunities to reallocate spend to extract a greater return on investment (ROI)
- > Generate detailed reports for routine spend analysis or budget planning purposes
- > Recruit, register, screen and manage vendors

In emergency situations, especially public health crises that require a nationwide or global response effort, state and local government entities that have access to a modern eProcurement system will also find it far easier than those that don't to:

- > Maintain continuity in procurement functions even if the entire team is teleworking. Buyers will be able to logon from anywhere to issue solicitations, review submitted bids and award and manage contracts quickly and securely. They can remain just as productive at home as they would be in the office. In fact, several state and local agencies that were still using manual processes or legacy

procurement systems prior to the COVID-19 outbreak found themselves prioritizing the procurement of eBidding solutions at the peak of the pandemic just to be able to procure everything else they need to get through it. (Just be sure your team also has the computer hardware needed to securely access agency systems, collaborate with colleagues and communicate with suppliers.)

- > Locate reputable suppliers and negotiate contract terms very quickly. Many agencies have had to go outside traditional channels to find specialized equipment or additional quantities of in-demand items, such as personal protective equipment (PPE). Agencies with online access to a one-stop-shop of supplier catalogs can quickly locate potential sources, inquire about available inventory and secure quotes. Those whose eProcurement systems directly plug into these extensive catalog databases are even more empowered to secure what they need in an instant using a simple click-to-order action (assuming administrators authorized such off-contract transactions).
- > Even if buyers have to secure permission to purchase outside normal contract vehicles, they can still use the eProcurement system to search for "off-contract" companies in a highly targeted manner using a NAICS or NIGP Code, review catalogs and verify current fulfillment capabilities.
- > Categorize organizational or departmental spend to improve fiscal management, file recoupment claims for federal emergency funds inform future planning decisions. This is especially true for agencies that also use a universal classification system such as the NIGP Code, which I discussed in detail in the April/May 2020 issue of Government Procurement. When you can quickly confirm on-hand, requested, solicited and procured quantities of essential emergency supplies, you can quickly take action to address shortages or increase stockpiles in preparation for future emergencies. Having visibility into categorical spend also helps to ensure accuracy in budget planning and expedite funding approval processes.

Remember: procurement is key enabler of emergency preparedness and response. Modernization is imperative right now to ensure buyers are equipped to act fast the next time an emergency situation occurs (or even as the COVID-19 crisis evolves.). In the coming months, as you're reviewing and updating your policies, processes and procedures to introduce greater flexibility in contingency situations, take the time to assess your means to execute them.

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.

COMING TO YOU VIRTUALLY

August 24 – 28, 2020



n behalf of NIGP, I want to express how thankful we are to our public procurement community for working tirelessly and doing whatever it takes to keep us safe during these unprecedented times.

Whether it's procuring testing kits for COVID-19, medical supplies to support hospitals, supplies and equipment for emergency command locations, protective gear for first responders, or chemicals to keep our water free from contaminants – your efforts save lives.

You are our heroes and represent public service at its best. Forum is a celebration of our community and the support we give one another in good times and in bad. This year we come together virtually to share your greatness, engage and inspire one another and develop strong meaningful connections for a better tomorrow because you define and embody procurement excellence.



The NIGP Forum 2020 is a celebration for you and about you. Enjoy this unique five-day virtual learning extravaganza.

Rick Grimm, CPPO, CPPB, FCIPS
Chief Executive Officer, NIGP

For 75 years NIGP Forum has been connecting procurement communities. It's the only large-scale event created exclusively for public procurement professionals. Every year, the greatest procurement minds come together at Forum to inform, inspire and ignite new ideas and new approaches that will propel the profession forward. This year, Forum promises to be a conference like no other.

Celebrating Public Service at Its Best

Forum 2020 is a five-day virtual learning extravaganza designed to celebrate you. It's an opportunity to engage with colleagues from across North America and beyond to share experiences and learn about the heroic work you are all doing to keep our communities safe and thriving in these challenging times.

"I can't describe how proud I am of the creativity and selflessness of the amazing individuals I work with in Norfolk, in the region, those I serve with at NIGP and across the nation and the world. Individuals who have come through again, who have risen again to meet the challenges of this remarkable world with strategic vision, insight and empathy, continuing to build a brighter future for all of us."

Mike Bevis, JD, CPPO, CPSM, C.P.M.
NIGP Governing Board Chair

Forum 2020: A Milestone Event

We're building upon our past successes of leveraging innovative technologies to deliver a milestone event that is impactful, insightful and unites passionate public procurement professionals who are committed to public service.

What This Means for You

- > 55+ procurement-focused sessions on trending topics
- > 8 carefully curated tracks that impact the profession
- > Live chats with presenters
- > Thought-provoking Keynote Speakers
- > Variety of Networking opportunities including agency networking sessions and coffee chats
- > Innovative Virtual Exhibitor Hall featuring suppliers offering the latest products and services
- > 18 Contact Hours/1.8 CEUs
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PREVIEW OF SESSION TOPICS BY TRACK

Track: Cornerstones

Session: Cradle to Grave: Procurement is Just the Beginning

Track: Cooperative Procurement

Session: Cooperative Procurement: Creating a Strategy to Drive Savings and Transform your Procurement Process

Track: Leadership

Session: A Boss's Nightmare: My Star Employee Stole \$6M in Plain Sight

Track: Relationship Management

Session: Living on the Edge: How to Balance Supplier

Relationships with Ethical Responsibilities

Track: Strategic Function-Procurement

Session: Fraud: Do You Look Good in Stripes?

How to detect and prevent procurement fraud

Track: Sustainability

Session: Social Responsibility! Why?

Track: Technology

The Purchasing Department of Tomorrow...Today!

SESSION PROFILES

Session: Request for Proposals 2.0: Different but not Difficult

A mysterious cloud surrounds requests for proposals (RFPs), making them appear opaque and difficult to understand, let alone engage in. As such, many procurement professionals see RFPs as a method of last resort. However, just because RFPs are less familiar to procurement professionals than other source selection methods, it doesn't mean RFPs are difficult or should be avoided.

This session takes a deeper dive into the RFP process and will help those new to this source selection method successfully transition from the 'black and white' approach of low bid awards to the more subjective and flexible RFP process. As an added bonus, learn when and where the application of professional judgment is important in the RFP design and process. Whether you are a new or seasoned public procurement professional, join the #RFPDreamTeam in an engaging discussion about the newly consolidated RFP best practices. Don't miss it!

Presented by:

Stephanie Dion, Manitoba Hydro, Canada

Mike Thornton, CPPO, City of Leesburg, FL

Lisa Frank, NIGP, Herndon, VA

Victor Leamer, CPPB, Spokane County, WA

Session: Taking Your Cooperative Strategy to the Next Level

With unending requests and demanding workloads, many organizations turn to cooperative contracts when they have a last-minute request, need to address an emergency or to quickly replace an expiring contract. The question to answer is not do you use cooperatives, but do you have a cooperative strategy? This session takes you way past the basics. With the new fiscal year just starting, discover ways for your team to leverage real savings (in time and money) that a cooperative procurement strategy can bring to your organization. Learn innovative procurement tactics of other agencies, unveil approaches when emergencies arise (and this year has been full of them), and how to educate your own internal teams (i.e. attorney's, City Council) on the benefits of moving to a cooperative contract.

This active session provides real examples and scenarios to help guide that decision process with panelists who offer a 360 view. Presentation will start out with Tammy Rimes, NCPP Executive Director and former Purchasing

Agent providing the latest updates on the world of cooperative procurement. The overview will be followed by a special panel interview representing all three sides of the cooperative decision - a cooperative, a supplier and a procurement professional. Learn as each side shares their own perspective and insights. Obtain real takeaways for your team to begin implementing a cooperative strategy. Presented by:

Tammy Rimes, National Cooperative Procurement Partners and NCPP Panel, San Diego, CA

Session: Here Comes the Judge: Procurement in the Courtroom

Imagine you've been hauled into court. What would you be asked? Here Comes the Judge will take you inside a courtroom for two cases on the judge's docket.

The first is a bid protest case. The procurement "speaks for itself," the judge declares. There usually isn't much testimony in these cases, and what there is usually comes from the procurement officer. As you watch, ask, "How would you have prepared for cross examination?"

The second case on the docket arose after contract award. A district terminated a construction contract for default and stopped payment. In the lawsuit that followed, the contractor is claiming the district waived a contract requirement: execution of a formal change order before doing the work. Would you be prepared for the kinds of hard questions you'll be asked?

You may never be in court. But Here Comes the Judge will illustrate the importance of planning, persuasion, and advocacy skills essential to our practice of public procurement.

Presented by:

Lynda Allair, CPPO, Retired, Ministry of Finance, Canada

Barb Johnson, CPPO, CPPB, MPA, Retired, State of Ohio Department of Corrections

Richard Pennington, CPPO, J.D., LL.M, Denver, CO

KEYNOTE SPEAKERS

Kevin Brown

Monday, August 24 | 11AM – 12:15PM

Plenary Topic: The Hero Effect



Kevin shares ideas, strategies and principles that inspire you to make a positive difference every day and go beyond what is required and do something remarkable. At the heart of his message is a simple, yet powerful philosophy for life that

drives every thought, every action and ultimately every result we achieve both personally and professionally. His plenary focuses on achieving greater results by eliminating 'ordinary' thinking and mastering the habit of excellence.

SCHEDULE AT-A-GLANCE

Monday, August 24

11AM – 12:15 PMOpening Keynote
Speaker Kevin Brown
12:45PM – 2PMAgency Networking
2:15PM – 3:30PMConcurrent Sessions
3:30PM – 5PMVirtual Exhibit Hall Open
5PM - 6PMVirtual Exhibit Hall
Happy Hour
6PM – 6:15PMClosing

Tuesday, August 25

11AM – 11:15AMOpening
11:15AM – 12:30PMConcurrent Sessions
12:30PM – 1:30PMAwards & Recognition
Celebration
1:45PM – 3PMConcurrent Sessions
3:15PM – 4:45PMVirtual Exhibit Hall Open
4:15PM – 4:45PMCommunity Service Event in
Virtual Exhibit Hall
4:45PM – 5PMClosing

Wednesday, August 26

11AM – 11:15AMOpening
11:15AM – 12:30PMConcurrent Sessions
1PM – 2:15PMAgency Based Networking
Sessions
2:30PM – 3:45PMNIGP Business Council Plenary
4PM – 5PMVirtual Exhibit Hall
5PM – 5:15PMClosing

Thursday, August 27

11AM -11:15AMOpening
11:15AM – 12:30Concurrent Sessions
1PM- 2:15PMTopic Based
Networking Sessions
2:30PM – 3:45PMTopic Based
Networking Sessions
4PM – 5PM“Custom Conversations”
5PM – 5:15PMClosing

**Create your own session – attendees can reserve Zoom rooms to discuss topics they want to learn more about.*

Friday, August 28

11AM – 11:15AMOpening
11:15AM – 12:30PMConcurrent Sessions
1PM – 2:15PMConcurrent Sessions
2:30PM – 3:45PMClosing Keynote
Speaker – Marilyn Sherman

All times EDT. Schedule subject to change

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Marilyn Sherman
Friday, August 28 |
2:30PM – 3:45PM
Plenary Topic: Front Row Leadership: How Top Performers Never Settle For Balcony Seats

It's hard to lead front-row teams when you're stuck in the balcony. It's frustrating to lead a team when you've lost your leadership mojo! Everyone needs some motivation and inspiration to breakthrough to the next level. You are not alone. You know you can accomplish more with an energized, motivated team. Marilyn shares the secrets that high performers use to be in the front-row. Discover how you can accomplish more, achieve bigger goals, and overcome fears and insecurities that don't serve you or your team.

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Instant Recognition

In addition to relevant learning that will accelerate your performance, with Pathways, you also get instant recognition of all your accomplishments via digital badges. Every module or certificate you successfully complete or designation you attain will come with a digital badge that tracks and showcases your achievement. These badges are delivered to you via Aspire, NIGP's learning portal. Share them with anyone through social media platforms like LinkedIn so everyone can see your accomplishments and your commitment to lifelong learning.

Pathways Learning Schedule

Specialization Certificate: Foundations of Technology Procurement – Learn strategies for negotiating and managing awarded IT contracts

August 11 – 13

Instructor: Stephanie Akerley, CPPB

Contact Hours: 27.5 | CEUs: 2.8

Core Certificate: Sourcing and Contracting

– Learn actionable solutions to sourcing and contracting methods, specification development,

evaluation methods and negotiations.

August 12 – 14

Instructor: Dennis Carney, CPPO, MB A

Contact Hours: 22.5 | CEUs: 2.3

NIGP-CPP Comprehensive Exam Prep – Learners will have demonstrated the successful foundational knowledge, skills, and abilities in alignment with the NIGP Public Procurement Competency Framework.

August 17 – 19

Instructor: TBD

Contact Hours: 22.5

Core Certificate: Foundations of Leadership

– Take your career to the next level by learning the skillsets you need to succeed.

August 19 – 20

Instructor: Lourdes Coss, CPPO

Contact Hours: 15 | CEUs: 1.5

Core Certificate: Foundations of Warehousing & Inventory Management – Learn best practices on how to ensure goods and materials are handled efficiently, effectively, and safely.

August 20-21

Instructor: Darin Matthews, CPPO, CPSM, FNIGP, C.P.M.

Contact Hours: 15 | CEUs: 1.5

(Pre-registration is required).

UPPC CERTIFICATION EXAM PREPARATION COURSES AVAILABLE

CPPB (Certified Professional Public Buyer) Prep – A helpful tool for the learner to access their strengths and weaknesses as they relate to the subject matter.

August 13 – 14

Instructor: William Tommie, Jr., CPPO

Contact Hours: 15

CPPO (Certified Public Procurement Officer) Prep – A helpful tool for the learner to access their strengths and weaknesses as they relate to the subject matter

August 13 – 14

Instructor: Carolyn Everett, CPPO, CPPB

Contact Hours: 15

(Pre-registration is required).

*Virtual Instructor-Led learning combines the best of in-person and online – you get the interaction and collaboration of in-person learning with the ease and convenience of online learning.

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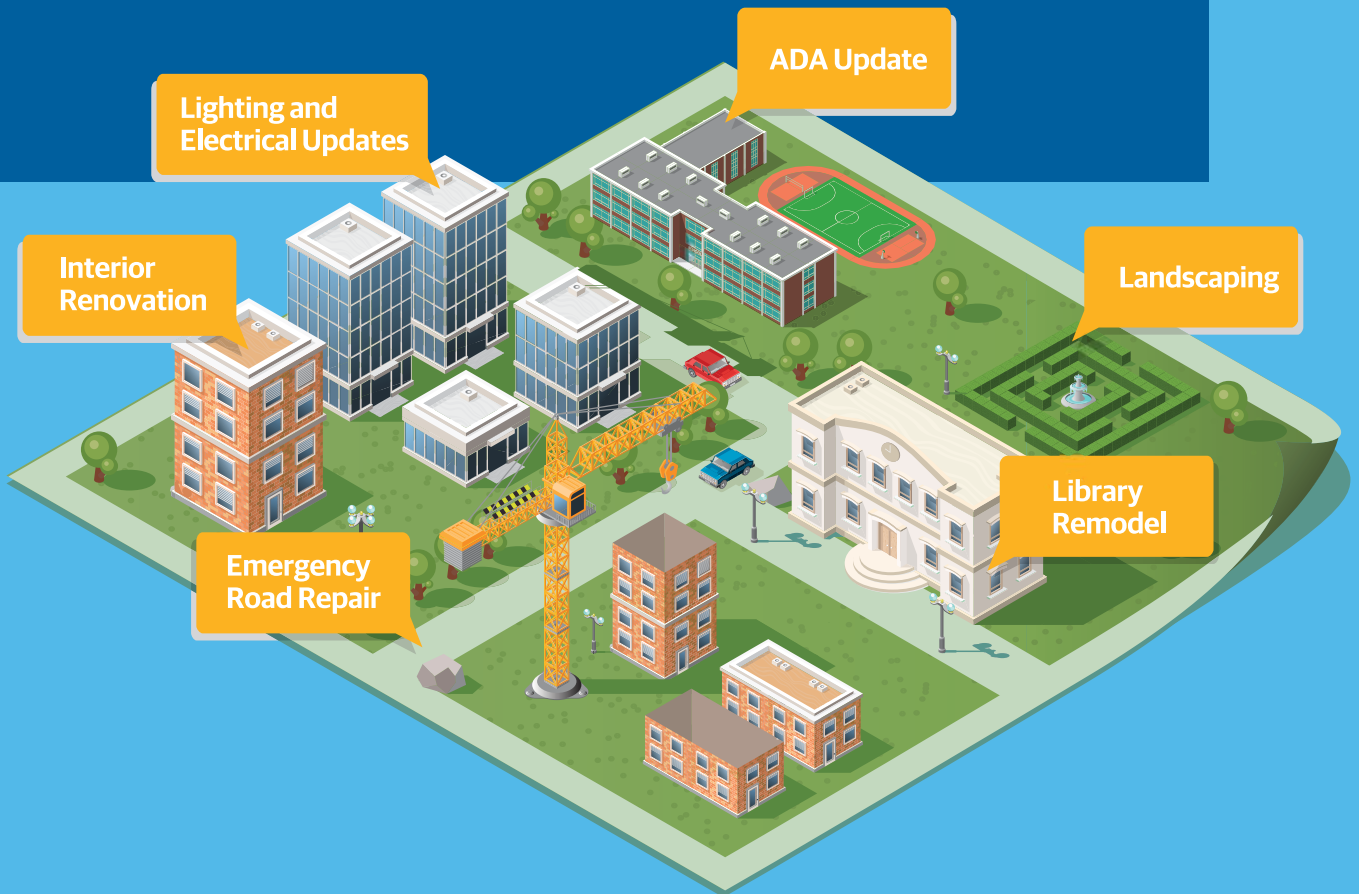
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Francis Hoar, Administrative Director, Miami-Dade County Public Schools



I Robot?

> **I** continue to be amazed with the evolution of technology in procurement and supply chain management. The advances I have seen these past thirty years make me excited about what we will see in the next thirty.

When I talk with my students from NIGP or the University of California, I am quite impressed with their technology proficiency. Many of them are digital natives, meaning they have grown up in a connected world of Internet and smart phones. Technology is a big part of their everyday lives, so it is really second nature to them. New software? No problem!

I have often shared my story of the evolving package, so here's the quick version. Early in my career I tracked an important delivery by calling the supplier or shipper, but then package tracking came along and I could do this on the Internet. Today, I don't need to track my package, because it tracks itself. It will notify me on my mobile device when it is scheduled to arrive.

Today we have an endless array of technologies available to us in procurement. These include digital procurement systems, procure-to-pay applications, contract management solutions, and automated retrieval systems. This list could go on and on.

By leveraging technology, procurement professionals will be able to forego the menial tasks and focus on bigger-picture concepts



Since there is so much technology in our world, does that mean that procurement and supply chain professionals are going to be replaced by automation? Students and professional colleagues often pose this question to me, especially those that are looking to enter the profession. I will share my response with our Government Procurement readers.

Procurement and supply chain is alive and well, and will continue to be an important part of our local and global business communities. The jobs they do for their organizations will not be replaced by robots. That is often what we see in sci-fi movies, but I don't think that is what we will see in procurement.

Will each of us be impacted by technology? Sure. There may even be some of us that assume a different role, but I think we will still be around. For example, a warehouse specialist may not be retrieving a part off the shelf any longer, as that function is often being automated. In fact, recent years have seen record

numbers of robotic equipment orders in North America. But that same specialist can take on more advanced duties, such as system implementation or inventory forecasting. In many ways it is the "thinking part" of supply chain management that is irreplaceable.

More traditional procurement processes such as distribution of solicitations, and receipt of sealed proposals are also being automated. This will allow a procurement specialist to let technology handle the routine duties while they focus on evaluation criteria and contract negotiation. By leveraging technology, we can help ourselves and the profession advance.

To my procurement and supply chain colleagues I say this: "Rumors of my demise have been greatly exaggerated" (Mark Twain).

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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August 24 - 28, 2020

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Connecting Like Never Before

This year we were so excited to bring you a truly memorable experience. Little did any of us know that we would have to grapple with a global pandemic. While it has been devastating, it has also shone a bright light on the heroic work procurement professionals are doing to keep our communities and our lives safer.

Bringing Forum 2020 to You Virtually

We will build upon our past successes of leveraging innovative technologies to deliver a milestone event that will bring the greatest procurement minds together.

Virtual Forum 2020 is a five-day learning celebration designed for public procurement professionals.

Highlights include:

- 50+ procurement-focused sessions
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- Built-In Networking Time with Peers
- Virtual Exhibit Hall
- Virtual Happy Hours
- And more...

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