From the Editor, April 2006

By Neil Markee, Editor-in-Chief

Tory Windley is getting a new boss, thinking about retirement, sees the transition as an opportunity to improve her department (and change her life) and suggests that you might want to take advantage of the changes in her shop to improve your own. As Editor in Chief of Purchasing Link, I can't believe that she may leave me/us but she sounds serious.

Lloyd Rain uses a familiar baseball expression to drive home the point that if the law says you need to get three bids it means you need to get three actual, viable bids. In fact, he makes a convincing case for getting five, even if the law only requires three. Take a look!

When I invited John Riley to comment on an article discussing strategic purchasing he took the discussion to another level. “Strategic” in John’s world includes the need to deal effectively with rapidly evolving, maybe unanticipated, needs. I’m not sure our exchange of email provides many answers but it may get you thinking about what your options are when the rate of change goes exponential in your world.

William S. Price was the visionary who made George Frank’s notion of cooperative purchasing work for many years. With NAEP’s 85th anniversary coming up now is a good time to review the Association’s relationship with the E & I Cooperative, its oldest and most important partner. Price (always Bill Price to the members) with Bert Ahrens was dedicated to making the NAEP/E&I Co-op partnership work—and for decades they did.
Commentary, April 2006

By Neil Markee, Editor-in-Chief

My invitation to John Riley to comment on my February article dealing with strategic purchasing initiated an email exchange you may find interesting. I asked, "What do you think about all this?" And John replied.

From John Riley, University of Arizona [1/6/06]

Neil,

"What do you think about all this?" Here is my response to your ending question in the recently published article concerning strategic purchasing.

Our profession is on the verge of a paradigm shift, and we are just now starting to recognize it.

Each of our institutions has the basic goals of providing instruction, research, and community service. The relative importance of these three functions at any particular institution may vary, but we all support the same three functions.

Technology constantly changes, and the rate of change is increasing. At the same time, our institutions look to technology to enable us to deliver instruction, research, and community service. In the instruction area, some professors are now doing podcasting to deliver course materials. The problem is that technology changes faster than our ability to deploy it. We are deploying an IEEE 802.11b/g wireless network in a two-year project. But people are already ahead of us, using Evolution Data Optimized (EV-DO) cards and the previously mentioned podcasting that uses RSS syndication technologies. Before we finish our wireless network, somebody will have invented something better, and our network will be obsolete. Moreover, it does not make any difference what technology we start to deploy—the chances are that it will be obsolete before we finish.

Since our basic functions remain, and since we need current technology to perform these functions, how do we buy what we need?

Our present purchasing paradigm, and all of our policies, processes, and techniques, are based on the assumption that we know what we want. Even in the case of Requests for Proposal, we think we know what we want but are willing to listen to alternative solutions. Working under the assumption that we know what we want, we focus on the goods and/or services we want to buy. Under this paradigm, if we buy a lot from a particular supplier, then that is a strategic supplier to us. From the supplier's view, if we buy a lot, then the university is a strategic customer. The logic is: buying a lot leads to a strategic supplier.

Our assumption is now wrong, and our current paradigm may be outdated. Strategic is not solely dependent on how much we buy. Our level of dependence on the supplier, and what we buy, matter as well.

In order to provide our core function of research, instruction, and community service, we have to be able to develop, deploy, and use technological solutions that have not been invented yet, and we must be able to do this on a continuous basis. We cannot do this alone. We can only do this with a select number of commercial "partners." Strategic purchasing certainly involves dealing effectively with strategic suppliers.

The underlying assumption has changed. We may not know what we want at the onset and we may not know what we eventually want until we are well into the project. The focus, then, is no longer on specifying goods and services, but the potential supplier of these evolving solutions, which are jointly developed.

Our current set of tools was not designed to produce negotiated strategic alliances. So, we must now change tools and redefine what a strategic supplier is. The establishment of long-term strategic alliances will lead to the continuous development of solutions to the evolving problems associated with delivering instruction, research, and community service. As a result, we will focus more on our strategic alliance partners and the firms that are allied with them.

We now need tools to identify what firms we want to become allied with, and then we need to ability to negotiate an alliance with them. This concept is not part of our current procurement code, but it needs to be.
Notice that the roles of Gatekeeper, Process Owner, Facilitator, and the current Strategic Contributor can be placed on the Service-Control continuum. If I am right about a paradigm shift, we will need to evolve into a new role of assembling the strategic alliances we will need, and then assisting in the management of these relationships. This will move us beyond what we now think of as procurement.

The above are thoughts developed in discussions with Ray Jensen, Adrian Sannier (University Technology Officer), and Robert Lane (Associate Director for Document Production Services). I would like to hear your feedback on this.

Thanks, John

From Neil Markee [1/8/06]

John,

Yesterday the NY Times carried an article charging that the U.S. defense department was not providing our troops the best body armor that was available. Without getting into the details and politics of the argument, I thought to myself that such an unhappy reality will always be the case. By the time they freeze a design, get a few hundred thousand produced, move them to where they are needed and train troops in their use, technology has moved on and we'll know that the recently introduced innovation was obsolete before it was shipped.

The Department of Defense at least knows that they are trying to protect the bodies of soldiers from enemy action. Your description of the reality in technology-driven areas on campus is even more difficult. Many of the people you serve are pushing the technology envelope and will not know what they really need at the time you would have to know it in detail to get it to them on time using the old approach. What they need may not exist and in the time it takes to deliver it, technology will have certainly moved on.

Obviously, you must have a purchasing system that is flexible in the extreme, and that may require a paradigm shift. Actually, I think the shift, or maybe the first of several basic changes in how institutions acquire what they need, may be under way. Strategic purchasing as currently envisioned assumes that the institution has in place a low-cost self-correcting, all but bullet-proof system to handle routine transactions. Not just low value needs, but all routine needs, large and small. With imaginative leadership and financial resources, I suspect that goal is within reach using current, ever-evolving business-process technology.

Beyond that, we will need a means to address non-routine needs. And now I am in well over my head, but struggle along with me. I think I might split this category into two areas, based on time constraints. Unusual needs that are either sensitive for some reason or very substantial could be handled using what amounts to routine processes custom-fitted to the situation and applied with a great deal of vision. That might be doable now on well-led campuses.

And then there are the extremely time-sensitive needs where change is driven by the technology that thousands of brilliant people around the world with only intermittent contact with each other are successfully pushing as hard as they can. Here we may have to abandon time-honored processes and take another look at our relationships with selected suppliers and other potential contributors.

Maybe what we need is a system of true partnerships involving a mix of several institutions and suppliers. We have been talking about limited partnerships with suppliers for years but few, if any, have ever been real partnerships where we commit ourselves to each other and absolutely share in losses and gains. The partnership might collectively pursue a goal under the terms of a new format and jointly awarded grant or contract. We might find ourselves paying partners, as we go along, not for a product delivered but for progress in research areas.

Perhaps within this relationship we could suspend the notion of economic competition. How we handle ego problems is another issue, and well beyond me. This approach probably would require a separate corporate entity and a new relationship with the source of funding. We might be able to measure performance via a bottom-line number, if the feds were willing to include an incentive based on the performance of the entity. Going in, we would need to agree on a risk of profit/loss distribution ratio.

There are a few models that we might want to examine. Much-battered-about NASA may be one. Their success is tied to the performance of their suppliers and they chase an ever-moving objective. In the airliner industry there are several jet-engine-building groups made up of manufacturers that are fierce competitors outside the joint venture. I don't know how
they cooperate and share technology advances successfully within the partnership while competing in closely related areas, but they do.

Throughout all of this, strategic purchasing requires that purchasing professionals seek ways to use the purchasing interface with the business community and other institutions to help the institution achieve its strategic goals. One basic goal for every institution has to be, “to deliver quality educational services at an affordable cost”—and that means that the savings in process-, product- and service-costs all have strategic impact. Income earned through research as described above has a purchasing component as well.

John, I think I’m getting a headache. How are you doing? What does your new purchasing paradigm look like?

Neil

From John Riley [1/9/06]

Neil,

Excellent points. I really appreciate your insight and perspective. Here is my take on some of them.

We have a system in place that handles 95 percent of our transactions very well. There are new strategic alliance opportunities that fall outside of the capabilities of our current procurement systems and philosophy. There are a small number of these opportunities, probably less than twelve. And in some industries, the key players can encompass the type of alliance we propose, and so that industry cannot be successfully incorporated into our system of alliances. Each of the twelve or so alliance partners will have some overlap with some of the others. For example, a partner like Google may collaborate with a partner like Sprint and a partner like Canon to develop a new method of delivering course content with us. The reason they would do this is to test and market technology and applications that they can sell to higher education and beyond.

These strategic-alliance opportunities, small in number as they are, may have greater impact on our core functions than all of the other procurement we do.

We can currently handle time issues with a waiver of normal public competition. These require high-level approval and justifications as to why it is not in the best interests of the University or our stakeholders to do a normal, public, competitive solicitation. But the waiver of normal processes is not applicable to the formation of a strategic alliance, because the normal processes are themselves not applicable to these situations.

The new paradigm purchasing process would: identify the industries needed for the system of alliances, identify the few key players in each industry; research them to identify their capacity and readiness to encompass an alliance; identify the firm targeted to be an alliance partner; and open negotiations at the highest level possible to effect the alliance.

Competition is at the research stage and, conceivably, without the participation or even knowledge of the players. Traditionally, we prove that we are good stewards of public monies by publicly competing our requirements on the basis of price. The new model does not have this type of competition. So, we will need to develop other methods of justifying that we are managing resources wisely.

I do not believe we will get to a point where we share profits and losses, as we would in a true partnership. There are too many legal impediments for us as a public institution, and our proposed alliance members are far bigger than we are. We are talking 100-plus billion-dollar companies, while we are a less-than-two billion-dollar operation. But the good news is that higher education may be uniquely qualified to suspend the notion of economic competition. We do not sell to make a profit, as our alliance members do, and we do not compete with any of them. Maybe we would like to mutually benefit from the technology we jointly develop.

I have to say maybe, as this aspect is only an aside to our major goal of delivering instruction, research, and community service with continuously evolving technology. If we do want to economically benefit from solutions we jointly develop, then some sort of joint licensing agreement would work. Note, however, that if we do this right, we would be licensing what, for us, is obsolete technology. The real benefit to us and to our alliance partners is that each of us would be furthering our core functions. They would be expanding their business opportunities, and we would be expanding our ability to provide instruction, research, and community service. These can be complementary rather than competitive.

Not only do we have to invent a new paradigm for obtaining alliance partners; we have to invent a new paradigm for managing the relationship. There will probably need to be a super-council of a limited number of senior people from both the alliance member and the university. The function of the council will be to manage the relationship and capitalize on opportunities as they are created. This would be far beyond the normal buyer-seller
relationship. And it would involve some of our other alliance partners for specific opportunities. And it will require people of great vision and fortitude. Rare people indeed!

There will be some adventures as those firms not selected as an alliance partner complain to the legislature, regents, and the press. Nevertheless, the potential benefit will far outweigh these adventures.

But our current path will not get us where we need to go, so we do need a new one.

Having fun.

John
For What It's Worth—Transition's Opportunities

By Tory Windley, Director of Procurement Services, University of Delaware

I'm getting a new boss. Don't know who, or when, but I do know I'm getting one. We're recruiting for a Vice President for Finance and I will report to this new person probably some time this summer. My present boss declined my kind offer to serve on (I would have even been willing to chair) the Search Committee—you know, pick your own boss..."have it your way." I've had the same, great boss for a long time, but change is underway in my little world here in little old Delaware.

I had some warning—some mention was made of the plan in the middle of last year. But it's still a little unsettling. The great unknown, the "four-letter word"—change. So, since the official word came, since the position was posted publicly, I've been thinking about my performance, my departmental operations, my opportunity to sell procurement, my plans for the department's future, and my plans for my future.

But I'm in a good position. Albeit on the younger side, I am part of the graying of my institution, and of higher education's administration and faculty. And I may be somewhat of a "short timer," if you will. I suppose my musings might keep me awake at night if I weren't as close to the end of my career here as I think I may be—if being on a beach somewhere weren't really the direction I'm headed. So, at least in my mind, I'm preparing a package for the new person of all the great things we do here in Procurement Services, how we've streamlined processes and reduced costs, how we work with customers for better service and increased savings, how good our people are, how hard we work, and the initiatives on the horizon to make us even better.

I've talked with my staff about the opportunities in front of us with new leadership and how we may be impacted. During this time, I have tried not to impart to them the unsettling piece of this puzzle. But it occurs to me that the reasons why this is not too stressful for me make it even more stressful for them. I'm getting a new boss this year. This will impact them directly. I don't know exactly when, but I'll be leaving relatively soon, too. They'll then be directly affected by my departure. I feel it is my duty to help prepare my staff for these changes, and getting ready for my new boss, may, in fact, make the transition to a new Director easier for my staff because they're prepared.

It's time they take an inventory of their skill sets and education. If they're thinking of getting higher degrees, now is a good time. If they don't have their C.P.M.s, now is the time (before it's changed in 2008). If they need further technical strengths in using reporting tools, e.g. MSExcel or MSAccess, now is the time. If they aren't particularly good supervisors, it's time to get training. It's time for them to review their career goals. Is procurement the profession they want to pursue long-term? If so, be the best—take this opportunity. If it's not—what is?

I think it's a good time for me to look at team-building again. It's one of those things that's in vogue for a while, has some positive impact, and then is perhaps forgotten. I'm planning to do a staff retreat-day to review our mission, to identify our strengths, work on our weaknesses and remind everyone how important everyone is.

So, you're not getting new leadership in your place? Maybe because you know we are, or with spring on the way, now would be a good time for you to look at where you are. Or encourage your staff to take inventory. I'm going to convert my musings into action. Probably should have done more sooner. Now I have incentive. If you don't have an incentive right now – go ahead and borrow mine. Happy Spring, and I'll see you in Baltimore.
By Lloyd Rain, Purchasing Link Contributing Editor

Introduction

Almost every set of purchasing rules in the western world contains the old saw about three quotes. It's as ingrained as, "Three strikes and you're out." Whether or not you play baseball, you know what that means. And whether or not you're a purchasing professional, you probably know what "three quotes" means.

One would think, as common as the phrase is, and especially as common as it is in all purchasing rules, that there would be no question about the meaning of "three quotes." Everyone knows it, everyone does it, and no one questions it.

Well, of course, that's not true. There seems to be no consensus on the actual meaning of "three quotes.

Some Current Examples

So, let's have a look. Here some examples of what we see in the field.

- U.S. Department of State, when purchasing foreign currency, "Bids should be solicited from not less than three sources." (Foreign Affairs Handbook, Volume 4, Book 2)
- Mississippi State University, "Get at least three competitive bids or cost estimates." (Information Sheet 1532)
- Stephen F. Austin Texas University,; "$5000.01 - $24,999.99 – Minimum 3 informal bids required; $25,000 - $49,999.99 – Minimum 5 formal bids required." (Procurement Handbook Policy C-10)
- Hanover County, Virginia, "Quotes may be obtained by telephone, facsimile, or email, with or without written confirmation. A minimum of three quotes is required."
- Victoria Government Purchasing Board (Australia), "An exemption from obtaining three quotes should only be considered in exceptional circumstances and where it can be demonstrated that one or more of the following factors are evident:..."
- City of Toronto, Ontario, Canada, "A minimum of three quotes must be obtained and such quotes shall be properly documented." (Audit Committee review of DPOs).
- City of Lafayette, Indiana, "Purchases greater than $25,000 but less than $74,999; Minimum of three quotes shall be obtained by the Purchasing Department."
- Marion County, Oregon, "All items, where the aggregate purchase price is $2,500 or more but is less than $25,000, are exempt from competitive bidding provided at least three written competitive quotes are obtained and attached to the Purchase Requisition."
- British Amateur Television Clubs, Aberdyfi, Gwynedd, UK, "For items valued over £25.00 three quotes should be obtained and for items valued over £150.00 three quotes MUST be obtained."
- And, of course, the great state of Oregon (in a typically elusive admonition), "If three quotes or proposals are not reasonably available, fewer will suffice, but the contracting agency shall make a written record of the effort made to obtain the quotes or proposals." (ORS 279B.070)

Essentially, they all say the same thing—within a certain range of costs, bracketed by formal competitive processes at the top end and no competition at the bottom, the "informal," three-quote-range means that the buyer shall obtain not less than three quotations (or three proposals) before making a decision on a source—and of course, the source, all other things being equal, shall represent the best value, usually the lowest, of those three or more quotations.

Nobody contests that. Except maybe those who are too lazy to do the job. Except maybe those who want to think that if you tried hard enough and you still don't wind up with three, why then it's OK and you can use just the two that you did get. Or maybe just the one.

Interpreting the Mandate

Our job, as guardians of the public purse, is to ensure that the rules of our domain are carried out to the best of our ability. So, what does the three-quote thing really mean?

Three quotes actually means, three quotes—not three attempts.
It does not mean two quotes and one attempt.
Nor does it mean one quote and two attempts.
One plus two does not equal three—nor does two plus one.
Three actually means three real, competitive quotations from three or more competent, reliable, contractors—

- without concentrating on friends
- without patronizing prior winners
- without sharing advance information
- without treating any of the quoters unevenly
- without treating any of the quoters with prejudice
- without treating any of the quoters with any preference
- without extending deadlines unevenly
- without sharing information from other quoters
- without trying to get as few quotes as possible so you can end the day early and go play golf

And with all of those hundred or so other attributes of fair and objective treatment that legitimize your quotations with enough ethics so that you can explain your final selection to your grandmother on her deathbed, and to all the unsuccessful “quoters,” with a clear conscience.

You might think that none of this really needs to be revisited. But it does—especially in light of an exchange that took place on our very own Listserv a few weeks ago (December, 2005).

### Interpretation of the Mandate

The issue was the perennial question, “If I can’t get three quotes, will two be good enough?” Much to my amazement, some of you said that this was perfectly alright.

Here's one response (the authors shall be held in anonymity for fear of my engaging their enduring enmity).

“As long as you attempt in good faith to obtain the three required solicitations, you’ve given due diligence to the process.” (I’ll not comment on all the misuse of English in this statement or on the remarkable fact that this person has a C.P.M. and CPPO.)

And another; "Our requirements state that we solicit three bids; we do not have to receive 3 bids.” Another C.P.M. This may be specifically correct for that particular institution, but in a general sense, it’s dead wrong—and it’s certainly bad business.

And yet another; "We solicit from three vendors; as long as you tried for three, then it’s all right.”

Well, no. It isn’t all right.

Where the “three-quote” rule is concerned, there’s not a rule in the nation that says two is good enough if you can’t get three, one is good enough is you can’t get two and none are good enough is you can’t get one.

### The Absolute Interpretation

If it says three quotes, then that’s the minimum—three fully responsive quotes. If you’ve addressed the market with a diligent effort to obtain three valid responses and you have less than three in hand, then there are three options:

- **Option 1:** You can obtain an exemption (An exemption is the application of a rule exempting a certain action from compliance with another rule. An exemption might be something like, “... the three-quote requirement is not applicable to purchases for ocean-going vessels.”)
- **Option 2:** You can obtain an exception (An exception is a discretionary action by an administrator who is permitted to make exceptions from compliance within his or her own discretion. An exception might be made in the case of an emergency procurement or, perhaps, because rigorous specifications limit the available sources.)
- **Option 3:** Or, you can get off your duff, send out some more RFQs or make some more phone calls and bloody well try harder until you’ve met the requirement.

### The Manager’s Dilemma

Yet, regularly our charges come to us requesting approval on processes in which less than three quotes were obtained and we are frequently called upon to approve these processes and the resulting awards.

Both exemptions and exceptions depend, to a certain degree, upon the character of the market and its size.
The Market Size
When there are fifty plumbers in the phone book and you ask for quotes from three of them and get only two responses, that’s not good enough—that’s not reasonable. Go out again and, this time, get three—or more; way more. I’m not about to sign my name to the puny effort defined in this scenario.

It surprised me that some of you apparently are. When teaching about this principle, my admonition is that you need to request your quotations (or proposals) from enough suppliers so that you are pretty well assured of getting at least three valid responses. A “no quote” just doesn’t count as anything but a waste of time and paper.

So when the facilities guy says that he faxed the RFQ to three electricians and gets one response out of the fifty in the phone book, and you are ready to sign off on a $25,000 purchase on the basis of one or two quotations, you are admitting in the face of anyone who examines the file, to being a fool—and not worthy of administering anything more complex than a pinochle game!

The logical response to the “three quote dilemma” is that if there is a market out there, then it’s quite easy to get three quotations on just about anything. Yes, you may have to ask for a whole lot more than three, but at least three are out there and relatively easy to obtain. More often than not, greater effort is the solution.

Small Markets
Most exceptions are dependent upon the size of the market—not on how hard it is to get the quotes or how much of your time it takes or whether you had three eggs for breakfast that morning. If, of course, you can document that the market is very slim—that, indeed, there are only a few providers, perhaps only one—why then, an exception from a competitive process may be in order. That’s why all procurement rules contain provisions for exceptions and exemptions.

But just being plain lazy is not a valid excuse for granting an exception. If there’s a market, three quotes means three quotes, not three attempts. That’s what the rule means and that’s what the logic behind the rule implies. That’s what the word “reasonable” implies. Three. Anything less is just plain foolishness—and on top of that, it’s bad business.

The Probable Origins
The three-quote minimum has been developed over roughly the last two centuries beginning with federal procurement rules in the early 1800s. The requirement began appearing in every state law during the mid-twentieth century.

Why three? The answer appears to be that one quote does not address a market, two quotes are too easy for collusion and three quotes are the minimum number of responses that are unlikely to collude in price—not absolute, just unlikely. The probability of three vendors colluding on a price is reasonably low, but there is still no guarantee that the price will be the lowest.

And isn’t that what we’re really after? Finding out the lowest price for a given product or service by expending at a minimum, a reasonable amount of effort? That’s our job.

The Objective
Yes. That’s the objective.

And the real answer to the question of how many quotations do you need in order to establish the lowest reasonable price with a reasonable effort is—are you ready for this? —five.

Five quotes. Five is the crossover quantity—the point at which savings decrease with increased effort (depending upon how the chart is stretched).

The Five-Quote Rationale
I had to establish this myself because, after posing the “Savings versus Quotations” question to a number of statisticians, the answers I was getting were unacceptable. Most of them said that the number could not actually be established because the solution did not reasonably fit into a “normal distribution” (Bell Curve).

But my daughter in law, yes the one that has a master’s degree in statistics and who is a VP of Key Bank in Cleveland at this time, taught me, by using Excel’s random number generator, to establish the relationship of savings to quantities of quotations by running a series of trials. I was able to establish the theoretical relationship between the number of quotations and the relative savings achieved.

Of course, it’s a trial-and-error method with a number of assumptions and, as such, it’s not perfect. However, the results were astonishingly clear. Here’s the chart.
We can make a number of observations from this chart (which is slightly skewed due to conversion to web format). Some are:

1. The greatest savings occur within the first three quotations.
2. Roughly three quarters of the available savings occur within the first five quotations.
3. After about five quotes, savings dwindle and after six or seven the additional savings become de minimus.
4. The greatest savings actually accrue at three quotes with a nice bonus of roughly 2½ percent of what we go up to five (if we abandon the process before reaching three quotes, we are throwing away big bucks—many informal ranges are now topped out at $150,000—abandoning that third quote could cost us as much as 4 percent or roughly $6,000 on a large purchase—tossing that much money into the dumpster with each project would be unconscionable).
5. The return on investment of time actually approaches zero shortly after ten quotations.
6. The continuous line represents an average of the data points; there is a discontinuity of unknown origin at the point of 6 quotations, probably because of incomplete data.
7. Here’s the same data in chart form.

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<th>Number of Quotations</th>
<th>Total Savings (Percent)</th>
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<tr>
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<td>2</td>
<td>4.0</td>
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The Real Objective of All This

So, even after the minimum requirement of three quotes is obtained, I like to encourage my staff to go for five—not because that’s the legal requirement, but because it’s the smart thing to do. We’re in the business of spending other people’s money and our job is to spend it wisely. In this case, wisdom is clearly five or more, preferably more, if we have the time and the inclination!

And after all, once you’re set up to obtain quotations; that is, you’ve got a pretty good idea of your needs, perhaps with a set of specs, some addresses of suppliers, and so on, how much more effort does it take to send the fax to ten suppliers if you’re already going to send it to three?

An Empty Handful

So the next time someone approaches you with the standard whining about having to get three quotes, you can explain the real objective—and that you really want five. And if they continue to whine, you can explain that ten will yield an even better result (and you can sit them down with this article).

The wise purchasing department manager knows when to apply those exemptions and exceptions. Whining is not a rationale for an exemption—and the absurdity that three attempts equates to three quotations is no part of an western logic that I’m aware of.

Those who would like to call it quits after “satisfying the process” are forgetting that the objective is to spend money wisely. And having some cockeyed idea about merely satisfying a process is like throwing the baby out with the bath water—somehow that maid forgot that the objective was to wind up with a clean baby, not a clean bathtub.

The math here is that one quote and two attempts do not add up to three of anything. Unsuccessful attempts to obtain quotations are like handfuls of sand—as soon as you look to see what you have, you have nothing.
The “informal” dollar range is usually bounded by about $100,000 at the top and $5,000 at the bottom.

One of the key parameters of the study was this; all random quotations were bounded by a low of $80 and high of $120, thus the median was an even $100 that made conversion to a percentage easy, of course. Sets of ten quotations were randomly selected for each trial run and the selected value was then based upon the best of the first two, three, four, etc. This was done a hundred times and averages were evolved from the data generated. Pretty simple. Very time-consuming!

Lloyd Rain retired as Purchasing Director of Lane Community College in October 2003 and is now the principal of Lloyd Rain Associates, a firm that provides solicitations for public agencies (www.rainassoc.com).
Historical Particulars
From the Editor's Files....

Incorporation of E&I Cooperative by Three New York State EBA Members

Excerpted from October 1, 1948 letter to Co-op "Group Representatives" from General Manager William S. Price.

Shortly after the organization of the Educational Buyers Association, pool buying, on a direct basis, took its place with the Bulletin, national convention, and group meetings as a major activity of the Association. Special, attractive discounts beyond the usual educational discount were thus made available to Association members...

... on July 18, 1934 George Frank of Cornell, E. E. Thompson, of Syracuse and Charles N. Wilmot of Colgate signed, acknowledged and filed the certificate of incorporation. Thus the Educational and Institutional Cooperative Service, Inc., came into being. The first President was George S. Frank with E. E. Thompson serving as Secretary-Treasurer. The first Board of Directors was made up of George S. Frank, E. E. Thompson, W. W. Irwin, University of Rochester, Charles H. Wilmot of Colgate, and Peter Cole of Hobart College. An office was set up, in Syracuse, and functioned under the supervision of Tommy Thompson, who was assisted by his assistant in the Syracuse University Purchasing Department, Don Knesel. Perhaps supervision is a poor word choice, for Tommy and Don, working after regular business hours, did all the work.

By early 1937 it was obvious that the organization was successful and members of the Association were urging its nationalization. This was accepted by the members attending the 1937 EBA Convention at Berea, Kentucky. President George Kavanaugh appointed a co-coordinating committee to work with the E&I Directors to work out the details. No time was lost and by September 15, 1937 Bill Price having been hired as Manager...
ELECTION RESULTS

Each year, a Second Vice-President/Secretary is selected to serve on the Board of Directors for a five-year period, moving through the chairs of office to the presidency. This year, NAEP Members from District I and District IV voted for the person who will represent them for a three-year term on the national board. The three new members joining the NAEP Board in May at this year’s 85th Annual Meeting and Product Exposition in Baltimore, Maryland are:

2nd Vice President/Secretary: John Riley, Arizona State University
District I Board Member : Chris Swezey, Babson College
District IV Board Member: Sue Burge, Ohio State University

Please extend hearty congratulations to your newly elected Board members.

In addition to the election of three new Board Members, three Amendments were overwhelmingly approved by the NAEP Membership. These included: changing the name of the Association in the Bylaws as well as in the Articles of Incorporation to the National Association of Educational Procurement; and, changing the fiscal year of the Association in the Bylaws.

A special thanks to our colleague Bert White, Texas A&M–Commerce, who acted as this year’s Teller of the Ballots.

NAEP 85TH ANNUAL MEETING AND PRODUCT EXPOSITION

Just a reminder that deadlines for registrations and hotel accommodations for NAEP’s 85th Annual Meeting & Exposition are fast approaching. The 2006 meeting runs from May 7 through May 10 in Baltimore, Maryland. This year’s Program Committee, Chaired by Bill Hardiman, Senior Vice President for the NAEP Board of Directors and Director of Purchasing at George Mason University, and his Program Committee have put together another outstanding selection of workshops for this year’s Annual Meeting. I hope to see many of you in Baltimore, as we celebrate NAEP’s 85th Anniversary.

For full details on the program, registration, hotel information and much more, visit the NAEP Web Site at http://www.naepnet.org/AM/Template.cfm?Section=Home
PARTING THOUGHTS

With this issue of the Purchasing Link, I'll conclude my monthly contribution of "What's Happening at Your NAEP". This month also marks my impending departure as your NAEP Board President. My second term as your President comes to a close at our Annual Meeting in May. It's been a grand time and I've enjoyed tremendously the opportunity to be of service to NAEP. Thanks to you and your continued involvement, our future as The Association serving Higher Education Procurement, is indeed a bright one. Continue to do great things!

Peace.

John Stephen Klopp
NAEP Board President, 2004–2006

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2006 Election Results
NAEP Welcomes New Board Members

Upon concurrence and approval of the Teller of the Ballots, Bert White, Texas A&M-Commerce, we are pleased to announce the results of the 2006 NAEP Board election.

2nd Vice President
John Riley, Arizona State University (54% of the vote) with approx. 19% of the members voting.

District I Board Member
Chris Swezey, Babson College (unopposed) with approx. 18% of District I members voting.

District IV Board Member
Sue Burge, Ohio State University (54% of the vote) with approx. 19% of District IV members voting.

Amendments

1. To change the name of the association in the Bylaws: 90% approve (passed)
2. To change the name of the association Articles of Incorporation: 89% approve (passed)
3. To change the fiscal year of the association in the Bylaws: 91% approve (passed)

Teller of the Ballots
NAEP, its Board, and its Membership thank Bert A. White, Director Purchasing & Contract Administration, Texas A&M-Commerce, for serving as this year's Teller of the Ballots.

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Countdown to 2006 Annual Meeting & Exposition

May 7-10, 2006 in Baltimore, Maryland
"Staying the Course" through 85 Years of Mutual Support

What You Need to Know
Okay, you already know that you must be there—to upgrade your knowledge and network nationwide with old/new colleagues from our institutions and supplier community.

Here, in a nutshell, is some vital information to help you plan your trip.

What's in the Program? To view the exciting, jam-packed schedule of workshops created for you by NAEP's Senior Vice President Bill Hardiman (George Mason University) and his hard-working Program
Committee. visit our Website:

Airline Discount: American Airlines

American Airlines is the official carrier for the attendees of the NAEP Annual Meeting & Exposition, May 7-10, 2006, in Baltimore, Maryland. American Airlines offers exclusive percentage discounts on travel from all markets where American Airlines, American Eagle, AmericanConnection Service and all one-world carriers (collectively “American Airlines”) provide service for U.S./Canada, Puerto Rico, Bahamas, Bermuda, Europe, Japan and Mexico point of sale only. Not valid for use in conjunction with any other discounted type fare; i.e., Senior, Child, Military, Government. Discounts are valid from May 7, 2006 through May 10, 2006. To obtain this discount, call American Airlines Meeting Services desk toll-free number: 1-800-433-1790. USE CODE A9356AY to obtain Annual Meeting fare discount.

Airport Transportation: To both hotels, BWI Shuttle Express $11 one way; $18 RT

Hotels:

Headquarter Hotel SOLD OUT
Hyatt Regency Baltimore  
300 Light St., Baltimore, MD 21202 
Reservations: 800-233-1234 
Parking: $17/day self-park; $22/day valet
Cut-off date for special rates: April 13, 2006

Overflow Hotel
Sheraton Inner Harbor  
300 S. Charles St., Baltimore, MD 21201 
Reservations: 800-325-3535 
Parking: $18/day self-park; $23/day valet
Cut-off date for special rates: April 13, 2006

Please Note the Cut-off Dates for Reduced Room Rates

The Exposition

Get a heads-up on which of your current or potential suppliers will be at the meeting. You can even find their booth numbers on this link:

Who Doesn’t Love an Aquarium?

Stroll through the beautiful, peaceful exhibits at the National Aquarium in Baltimore for a mid-meeting unwinding from the intense workshop schedule. Don Krech and his band Cool Blue provide dinner music afterward. Thanks to the Host Committee for arranging this treat.

Big Baltimore Anniversary Bash: Awards Banquet and Gala Wednesday, May 10

After a formal (dress-up) dinner, we will announce the winners of NAEP’s four major Annual Recognition Awards, honor our volunteers, and recognize others for their personal achievements. The Passing of the Gavel takes place and the outgoing and incoming NAEP Presidents address the membership. NAEP will also be celebrating our 85th Anniversary at this gala event. Live music for dancing provided by the BaHa Brothers.

Dress for this event is Black-Tie Optional. The Men's Warehouse is offering a 15 percent discount on tuxedos to NAEP and will deliver them to the Hyatt Hotel. For details on how to reserve through your local store click here.
Scholarship Fund Boutique Needs Your Shirt

We're still looking for donations to the Host Committee's little shop of goodies that will be sold to benefit the NAEP William E. Haas Scholarship Fund. The Fund grants cash awards to worthy recipients to attend NAEP meetings and seminars. Typical items sold at the boutique include new clothing from your campus bookstore-T-shirts, jackets, accessories, sporting equipment, pennants, stuffed animals, decorative items, and more.

Be sure to take the old checkbook along and shop and pick up a souvenir for friend, family, or co-workers back home.

Bring your donated items to the meeting and deliver them to the Host Committee area promptly so they can be displayed for sale early. Or ship items, to arrive by April 19, to:

NAEP, 5523 Research Park Dr, Baltimore, MD 21228. Mark package: For Scholarship Fund

Assist a Newcomer: Join the Annual Meeting Mentor Program

There are always more than 100 first-time attendees at any NAEP Annual Meeting—which is why the Annual Meeting Mentor program came to be (formerly called AMPS for Annual Meeting Patron System). The AMM program is comprised of volunteers who make a newcomer comfortable, prepare them for what to expect, and launch them into the networking dynamics. AMMs are volunteers committed to personally welcoming one or two people who have never attended an NAEP meeting, or haven't done so in several years and might like some friendly help in re-entering the community.

As a Mentor, you will:
- Contact newcomers and answer any general questions about the meeting.
- Encourage attendance at the New Attendee Orientation.
- Arrange a time and date to meet each other at the meeting.
- Explore the possibility of traveling with the new attendee, if feasible. NAEP will match you to a newcomer in your region.
- Introduce the newcomer to other NAEP members.

It takes some commitment, but it makes such a big difference to our new attendees. If your schedule for the May meeting allows you just a little extra time, you can help us by signing up as a Patron. To volunteer, phone the NAEP National Office in Baltimore at 443-543-5540.

Calendar of Events

September 27-29
NAEP Procurement Academy
Tier 1 Foundation
Renaissance Tulsa Hotel
Tulsa, Oklahoma

REGIONAL MEETINGS

September 24-27
TOAL (Texas, Oklahoma, Arkansas & Louisiana)

October 1-4
MINK (Missouri, Iowa, Nebraska, & Kansas)

October 9-11
Minnesota, Dakotas & Manitoba Regional Conference

October 17-20
New England (Connecticut, New Hampshire, Maine, Massachusetts, Rhode Island, & Vermont)

Visit our Website for details and updates: http://www.naepnet.org/AM/Template.cfm?Section=Professional_Development

Obituary

Bruce Hawley

A recent email from NAEP Past President Dolly Prenzel disclosed that Bruce Hawley had died October 27, 2005. Bruce was the longtime Director of Business services at Vanderbilt University and for many years one of the key leaders of the Association's regional group. Although a transplant from New England, (Mt. Holyoke, I think) Bruce was well established in Nashville by the time I first introduced to him by Bert Ahrens in 1971.
Hawley and Vanderbilt hosted the regional meeting several times and, one way or another, Bruce always managed to get tickets to the "Grand Old Opry" for out-of-town visitors on short notice. I’m sure Dolly considers "Mr. Hawley" as one of the mentors that helped shape her long and successful career within higher education. - NDM

### Member News

Karen Elvidge (Procurement Specialist) and Marty Newman (Assistant Director of Delegated Procurement) at University of Maryland-College Park, have both been recertified as CPPBs as of December 2005.

Sandi Dingman, C.P.M., Buyer, Eastern Idaho Technical College, reports that she took the C.P.M. Module 3 and Module 4 exams at NAEP's Annual Meeting in Salt Lake last year, and received her lifetime C.P.M. on August 3, 2005.

Purchasing Specialist Anthony Durrum, from Rollins College in Winter Park, Florida, received his A.P.P in February 2006.

Beckie Beard, Director, Purchasing & Materials Management at Lansing Community College, was awarded lifetime certification for both the C.P.M. and A.P.P. on February 16, 2006.

Pamela McCrigh, Senior Buyer at the University of Nebraska Medical Center received her Lifetime C.P.M. in December 2005.

Thomas L. Brinson reports that he is retiring after 30 years of service at Ball State University. Tom was President of the NAEP's Indiana region in 1988.

Kevin Murphy, E-Commerce Buyer, Del Mar College, Corpus Christie, Texas, received his CPPB certification in fall of 2005.

Eugenia (Jeanie) Regencio, Acting Director of Purchasing at the New Jersey Institute of Technology (NJIT) in Newark, New Jersey, attained C.P.M. recertification in January 2006.

Send items for publication in the Bulletin to btorre@naepnet.org with Subject Line: Member News.

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### NAEP Webcast Scheduled for May 25

**Spaces Matter: Aligning Your Campus Environments and Your Strategic Plan**

**Presenter:** Ed Roy, Workplace Consultant, Steelcase Inc

Mark your calendar now for this latest professional development opportunity from NAEP.

Broadcast date: May 25, 2006  
Time: 11 a.m. PST / 12 noon MST / 1:00 p.m. CST / 2:00 p.m. EST  
Fee: $99 member; $199 nonmember

A lot has changed. Higher-than-ever expectations from today's students and their parents, increased competition for faculty and dollars, rapid changes in technology, diverse learning and teaching styles, more pressure to measure results—these are just some of the critical issues colleges and universities are facing today. Institutions of all types and sizes are looking for new ways to be closer to the cutting edge, and facilities are a bigger-than-ever part of the solution.

**What You Will Learn**

- Findings and insights from Steelcase's ongoing research into evolving educational environments.
- What kinds of spaces appeal most to today's students and faculty
- How to transform under-used spaces.
- Ideas for increasing the strategic value of your classrooms, offices and the often-overlooked areas between them.
- How institutions such as Northern Arizona University, Tarrant County College and the University of Connecticut are leveraging their facilities in unique ways to get the results they're after.

**Who Should Attend**

The content of the Webcast is geared to decision-makers from areas including:

- Academic Administration
- Admissions
- Business
- Campus Planning
- Design
- Development
- Facilities
- Faculty
- Human Resources
- Purchasing
- Student Services
About Ed Roy, Workplace Consultant, Higher Education Steelcase North America

Ed Roy is the National Workplace Consultant for Higher Education at Steelcase Inc., an international work-effectiveness company headquartered in Grand Rapids, Michigan, whose knowledge, products and services enhance the quality of people's lives in work environments.

In this position, Ed Roy is part of a team that conducts observational research into teaching styles and learning behaviors at colleges and universities throughout the United States and Canada. He frequently presents findings from this research and ideas for applying it to audiences representing colleges, universities and design groups, and he is presenter in programs administered by the Interior Design Continuing Education Council and the American Institute of Architects Continuing Education System.

Appointed to this position in September 2003, Ed joined Steelcase in 1995. Prior to joining Steelcase, he was with Procter & Gamble in Cincinnati, Ohio. A native of St. Louis, Missouri, Ed Roy holds a bachelor's degree in finance from Saint Louis University.

Welcome to B&H Photo Video Pro Audio NAEP’s Newest Business Affiliate

NAEP is proud to welcome B&H Photo Video Pro Audio as our newest Business Affiliate. B&H is a major source of photo, audio, video and computer products for procurement professionals in our higher education and associated communities.

Stop by Booth 723 at our Annual Meeting Exposition in Baltimore to meet their representatives and explore their products.

Visit B&H's website: http://www.bhphotovideo.com/

NAEP Business Affiliates select Basic or Enhanced Membership (Platinum, Gold, Silver tiers). Business Affiliate Members are corporations, organizations, manufacturers, and suppliers that serve the higher education and secondary education markets. Membership benefits include access to purchasing decision-makers at more than 1400 institutions on both local and national levels. Our 19 regions throughout the U.S. invite industry experts and suppliers to participate in their professional meetings via presentations or exhibits.

For full details on NAEP’s Business Affiliate Program click here.

NAEP Welcomes New Members

VOTING MEMBERS

December 2005

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Ohio Region

January 2006

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UPSTATE NY Region

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February 2006

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Metro NJ/NY Region

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DE/PA/WV Region

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January 2006

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Northwest Region

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DE/PA/WV Region

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February 2006

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DC/MD/VA Region

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Metro NY/NJ Region
Top 10 Tips for the New Supervisor

Becoming a supervisor for the first time can be an unnerving experience. You may feel as if you have been dumped into a trackless desert where people await your leadership before anyone has handed you a map. Here are some signposts:

1. **Be yourself.**
   Do not try to be your predecessor or to emphasize your difference from your predecessor. You can only be confident that your center will hold in times of pressure if you remain yourself.

2. **Start slowly.**
   Do not be a “new broom” that immediately tries to sweep away all previous procedures. Reassure your staff that it will be “business as usual” at least until you get the lay of the land and have a clearer idea of what is needed.

3. **Gather information.**
   Observe, ask questions, be a good listener, solicit input, let people know you are open to being informed of problems.

4. **Be visible.**
   Move around among your staff. Find ways to get to know them. If necessary, create reasons for contact so that you can establish good two-way communication.

5. **Review written materials, policies and procedures as early as possible.**
   Identify priorities, put yourself in a position to know what needs to be done without having to depend on others to give you information that is actually already available to you.

6. **Use your boss and seek a seasoned mentor.**
   Do not use these sources to get information that is available in training materials and procedures manuals that you will be expected to have read. Turn to your human resources for information that will not be available writing. Particularly, get clarification on the extent of your authority and your responsibility, where the ball is yours to carry, and where it must be handed off. Also, seek information about any ‘political’ problems or inter-departmental concerns.

7. **Emphasize teamwork.**
   You are not a lone ranger, and your staff are not peons. Early in the game they probably know more than you about many aspects of the job. While you will need to establish your authority, you also need to empower your staff as members of the team.

8. **Be evenhanded, fair, and consistent.**
   Discover for yourself the strengths and weaknesses of your staff. Beware the eager beaver staff member who tries to fill you in on everything and everyone on your first few days. The information s/he gives may be filtered and self-serving.

9. **Promise-and provide-good communication in both directions.**
   Let your staff know that you will keep them informed whenever possible, and build trust that you will avoid surprises whenever it is in your power. Encourage them to seek clarification when necessary. Let your staff know that you care about them, and, above all,
that when they speak with you they are heard.

10. **Wherever it is within your power, make your own decisions.**
    You are the new kid on the block, and people may expect to be able to influence you. Be clear that when you seek information and advice, you are not handing over the reins. You are simply gathering additional data for use in YOUR decision-making process.


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**Quote of the Month**

*The greatest pleasure in life is doing what people say you cannot do.*

-*Walter Bagehot*