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National Association of Educational Procurement

Letter from the CEO

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Each year, NAEP calls for nominations from the Membership for several Annual Recognition Awards. Winners are announced at the following year’s spring Annual Meeting. Here are our top leaders for 2012. There are also approximately 300 other ongoing volunteers. Each and every one is a vital part of the brains, heart and soul that make NAEP a prestigious resource within the higher ed purchasing profession.

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Strategic Procurement Institute
January 13-15, 2014
Denver, CO

Procurement Academy (Tiers I, II, & III)
February 2-4, 2014
New Orleans, LA

RFP Process Institute
February 5-6, 2014
New Orleans, LA

2014 Annual Meeting & Exposition
May 18-21, 2014
Louisville, KY

Supplier Diversity Institute
August 4-5, 2014
Chicago, IL

VIRTUAL ROUNDTABLES*
September 26, 2013: Strategic Procurement
Additional dates and subjects to be announced.
Visit www.NAEPnet.org for details.

WEBINAR SERIES
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Contracting Authority & Relationship with Legal Counsel
October 29, 2013

Special Issues in Contracting
March 19, 2014

Purchasing Policies & Special Issues in Contracting
April 29, 2014

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Lure Lodge, KY

TAGM – September 22-25
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Nashville, TN

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E&l Members please go to www.bandh.com/eandi for ordering information
LETTER FROM THE CEO

NAEP Honors Excellence: Congratulations to Our 2012 Award Winners

Doreen Murner
CEO, NAEP

In my last column, I wrote about the importance of volunteering. Volunteering is its own reward, but there are some tangible benefits, too! At our Annual Meeting in Orlando this past spring, we recognized our top performers and achievers in our community with our NAEP Awards for the year 2012.

We are very thankful for our volunteers and the work they do on behalf of NAEP. In addition to the recognition they receive during the meeting and throughout the year on our website, I feel that it is important to highlight the outstanding contributions each has made to the profession and to NAEP by acknowledging them in this column.

Award of Excellence in Procurement
University of Maine System

Bert C. Ahrens
Achievement Award
Sandy Hicks, CPPB, Assistant Vice President & Chief Procurement Officer, University of Colorado

Distinguished Service Awards
Karlin B. Cooper, CPP, LEED BD+C, Purchasing Contract Manager, Indiana University

From the CEO

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2013 Fall Issue
Ever have a giant magnet arrive on campus, and it needs to go in a basement lab and it is too heavy for the elevator—so you have to dig a trench and knock a hole in the wall to bring it in? How about having to remove hall and classroom doors and take apart an ultra-low-temp freezer to get it into a lab? Maybe you have ordered an icemaker, and when it is delivered the department realizes that no chilled water is available within 200 yards of the building?

What is purchasing’s role in these situations? We know we are likely going to get the call to help fix the problem, but what is the best way to avoid it in the first place? At my university, Iowa State, two efforts have helped eliminate these types of problems—communication and education.

Communication
The first hurdle we needed to overcome was the line of communication between Purchasing, Facilities and the various other departments. We wanted to create guidelines to help purchasing agents determine when an issue might arise, and then develop a procedure to work with departments in addressing these potential issues. The first step was to meet with our Facilities Department to determine what types of items create the most issues (sidebar 1). From this list, we created a series of questions (sidebar 2) that agents could answer as they reviewed the specifications, or that they could ask the department to answer. We called this a Facilities Impact Assessment. Agents perform this assessment when they receive an order that falls within the list, or, if by looking at the item, they believe it needs further discussion.

We then worked with Facilities to determine what actions needed to be taken after an assessment was made. The actions depended on one of three outcomes to facilities: no impact, potential impact needing investigation, or definite impact. If no impact is expected, then the order proceeds as normal. If we are unsure of the impact, we work with the department and Facilities to get a more complete assessment. If there definitely is an impact, the department works with Facilities to determine if a project is needed (e.g., additional utilities or larger space/opening). In some instances, if the project costs exceed that of the item, the department may need to take a fresh new look at different options for the purchase.

Education
The second piece of our program was to incorporate the questions and the process into training for our agents and campus. The agent training was simplest, as it targeted a small group of people who already understood the issue. The more difficult piece was getting the message out to campus. Since we have an e-procurement portal and a P-Card program, there was a potential for people to order things that could have an impact, but would not go through Purchasing directly. To keep the training effort reasonable, we worked with departments to send administrative people who then brought the information back to their staffs. The result has been a general elevation of the awareness regarding items of potential impact and the related thought-processes to successfully address them.

The program has been effective. While not perfect, it has opened the lines of communication and created a dialogue that is helpful. I would urge you to look at this and other potential partnerships throughout your campus. They can create efficiencies and improve communications.

Sidebar 1
- Battery Chargers
- Food Service Equipment
- Fume hoods
- Freezers/Ultra Low Freezers
- Furnaces and Ovens
- Glassware Washers
- Ice Machines
- Kilns
- Lasers
- Magnets
- MRI Machines
- Sterilizers/Autoclaves
- Super Computers
- Vibrations-Sensitive Equipment

Sidebar 2
- Does it fit through a standard door?
- Does it require any unique building services that are not available?
- Are we replacing in-kind equipment?
- Does it require any special equipment to be moved?
- Is the right power available?
- Is the equipment sensitive to vibrations or does it cause vibrations?
- Does the equipment create heat, noise?
Facts and Advice About Tackling the E-Procurement Challenge

by Kimberly Dulaney
Virginia Polytechnic Institute and State University

So you have seen all the presentations, you’ve heard all the stories, you’ve entertained the sales calls, and you think you may be ready to implement a fully functional, integrated e-procurement system. But where do you start? Hopefully, this advice from a school that has been through the process from start to finish will help you navigate the seas of change and help you chart a path of least resistance.

There are many options in the e-procurement arena, ranging from simple electronic systems that support the traditional procurement process to complete Internet tools and platforms that replace the traditional procurement process. For Virginia Tech, we chose an e-procurement system that integrated with the financial portion of the university-wide ERP system that is the management information system. This system integrates and automates many of the business practices associated with the procurement function.

What Does an E-Procurement System Add to a Business Process?

First and foremost, e-procurement adds automation. The Virginia Tech solution encompasses budget approval on the frontend, a user-friendly procurement process with a defined workflow process, and a receivable process for inventory that allows the accounts payable process to function efficiently. The Hokie Mart system supports electronic payment processes and requires positive reviews and approval controls to be in place to function properly.

An e-procurement system allows you the capability to route selected documents for specialized internal review and approval. In our case, we have the ability to include sponsored programs, environmental health, security, or any other applicable stakeholders in the review and approval process.

E-procurement systems have the capability to support diversity and sustainability programs. Vendors are identified in the system and provided with visibility to the end-user. Reporting tools can allow for enhanced use in these areas by providing information that would otherwise not be accessible.

At Virginia Tech, we are able to identify small, woman-owned, and minority-owned business expenditures as measured in dollars in each business category and as a percentage of our overall budget.

Another benefit of an integrated e-procurement system is the ability to promote usage of negotiated term contracts. Virginia Tech has close to 500 contracts in place. A lot of work has gone into negotiating and securing these contracts. The Hokie Mart platform allows end-users to access these contracts and streamline the ordering process. Prior to the implementation of the system, each department was responsible for tracking its own contracts. Campus-wide contracts were difficult to manage, due to the inability to get current information out to a very large campus in a timely manner.

Increased use of contract suppliers combined with electronic payment results in price savings for the campus. Better reporting tools enable us to negotiate more aggressive future contracts. We are able to measure year-over-year spending with our contract suppliers and provide data to vendors and departments.

What Exactly Does an E-Procurement System Look Like?

E-procurement is a sourcing tool that allows end-users to shop via an electronic platform. Basically, e-procurement involves the electronic data transfer of information between various stakeholders to support operations, tactical, and strategic procurement initiatives. Virginia Tech implemented a web-based, third-party solution in 2007. Hokie Mart allows end-users to shop selected catalogs online,
enter requisitions, receive items, enter purchase orders against contracts, process invoices, request printing or other services, and request reimbursements.

Any e-procurement system has to be fluid. These systems constantly need to be updated. Our e-procurement system has gone through many changes, most recently, one that involves the ability to electronically deliver all of our purchase orders to the vendor.

**So, How Should You Start?**

1. **Build Your Team.**

   As you go forward, you may need several levels of teams. But to start, you need leadership from Procurement, IT and the Controller in order to get a full view of how all the pieces work together. Most importantly, you need their individual buy-in to participate fully in the journey.

2. **Identify Goals.**

   What do you want in a system? How much “E” do you want in your e-procurement? How will an e-procurement system interact with existing systems? These are areas where you have to do your research. For Virginia Tech, we required a system that integrated fully with our existing ERP (Enterprise Resource Planning) software, Banner Finance Module. A longer-term goal was to implement electronic payment with high-end suppliers, as well as deliver purchase orders electronically.

Our e-procurement system has gone through many changes, most recently, one that involves the ability to electronically deliver all of our purchase orders to the vendor.

It is important for those involved in the procurement function to have an understanding of the e-procurement concept and the tools available to assist in the development, use, evaluation and refinement of the complete process. This information is important as you strive to not only make decisions regarding investment, configuration and use, but in selling the e-procurement concept as a means of improving procurement efficiency and effectiveness.

During this process, it is important that you make a commitment to form an on-going, long-term relationship with a vendor that understands your goals, systems and processes. You also need to understand that this project is always flowing and never ends. Updates are critical and ongoing. For this reason, it is important to gain support from all stakeholders from the start of the initiative.

3. **Build Your Case.**

   One of the most important steps in implementing an e-procurement solution is to gain buy-in from senior leadership. We started with top leadership. We convinced the executive

*Continued on page 10*
vice-president that this system would save costs by driving down the requisition to order administrative costs by approximately 58 percent, streamline the requisition to order time by up to 66 percent, and empower end-users with a transparent, user-friendly system. We addressed the concerns of accountability, internal controls, and expense reduction by insuring that the proposed e-procurement system had the proper approval and tracking processes that increased efficiency while driving down costs. This improvement allowed the Procurement Department more time to “procure” with an enhanced workflow.

Once we had the buy-in from senior leadership, we met with deans and department heads, announcing the system, explaining the system and its benefits, and helped prepare their expectations. We then started meeting with the individual college business officers and fiscal leaders. This was all done before any training and conversion processes were attempted. It was our goal to make the transition as least disruptive as possible.

4. Embrace Promotion and Implementation.

Communication is critical during the implementation phase. It is important to allow plenty of time for addressing concerns and training. Virginia Tech has a strong sense of adhering to policy, as well as the added restrictions of public procurement. Everything we do is required to be transparent. We have well-defined business processes and the procurement function is a key element of that process. We were involved with the launch of new financial software in 1998. We knew how difficult a transition could be. We knew we needed a user-friendly system that streamlined processes and resulted in administrative efficiencies that completely integrated with Banner Financial Package. We were fortunate to assemble a strong team at the start of the process. This team included key stakeholders and committed technology support from both campus and vendor.

5. Moving Forward

As you choose a system, keep your eye on the future. You can create a one-stop, consolidated process if you do it right. Be sure to communicate with your existing vendors. There are still a lot of small vendors who have no idea of what e-procurement is. They may feel excluded. Before you implement a system, have policies and procedures in place to address issues. Be sure you have the buy-in of top leadership and be ready to enforce the policies and procedures.

Have a specific training-process in place and be sure to offer on-going training opportunities for both end-users and vendors. During our implementation, we provided training to more than 4,000 faculty and staff members. We implemented the system incrementally to avoid as much disruption as possible, while providing the maximum amount of assistance to those making the conversion.

Be prepared to commit both time and resources to upgrade and enhance systems, making them a priority. An effective e-procurement system must be technologically current. You do not want to spend significant resources on a quality product, only to have it become inefficient or inadequate due to the lack of resources to keep the technology current.

Be prepared to commit both time and resources to upgrade and enhance systems, making them a priority.

Do your homework. Take the time to fully understand the functionality of an e-procurement platform and what it will bring to you as a procurement professional, thus enhancing your services to campus. Network with your NAEP colleagues who may have blazed the path. Ask them for lessons learned.

This process has the ability to tie remotely located units, research centers and multiple campuses together into a single system. It will also provide enhanced visibility of connections between suppliers and internal users, and it lays the basis for enhanced spend analytics.

Today, the Hokie Mart is as much a part of campus as any other tradition here at Virginia Tech. With communication, support, flexibility, commitment, testing, training programs, and patience, we were successful with this implementation and have a very high rate of satisfaction across all areas. It took a while, but the payoff was worth it.
Higher education institutions continue to feel the pinch of having to do more with less, making it critical to improve purchase-to-pay (P2P) efficiencies, reduce costs and reap savings. Such goals can be sabotaged, though, by over-controlling your payments and, in particular, your card programs. Is your organization among those that over-indulge in this respect? The NAPCP (a professional association for the commercial card and payment industry) offers three key strategies to get your payments in shape.

Use the Right Mix of Payment Tools

Lean, effective payment strategies will remain elusive if we limit ourselves to traditional P2P processes, which most commonly involve a requisition, purchase order, invoice and check payment. The process cost often exceeds the value of the item being acquired (e.g., the process costs to purchase a $25 book may exceed $100). Traditional P2P processes, with their well-known controls (e.g., pre-purchase and pre-payment approvals), represent the ultimate “comfort food” within the commercial payments industry. People gravitate towards what makes them comfortable.

The notion of comfort is what makes electronic payables so appealing within the realm of commercial card solutions (visit www.napcp.org/EPayables for an overview). These solutions are designed to allow us to keep doing what we’ve always done, but switch from paper checks to electronic payments. We feel leaner and potential rebate incentives make us feel even better, but this doesn’t mean we have a well-balanced payment strategy. A traditional P2P process in any form, including electronic payables, is associated with a greater process cost and, therefore, best suited for large and/or complex purchases.

The majority of an organization’s purchases (approximately 80%) are less than $2,500. Because of the low dollar value, they do not warrant many of the pre-purchase controls of traditional and electronic payables P2P processes. They could be streamlined with P-Cards rather than mindlessly “rubber-stamped” through procurement and accounts payable (see also “Why Use P-Cards” at www.napcp.org/P-Card-Intro). PCard controls have proven to be effective and efficient when properly utilized. The exercise of identifying a threshold at which extra steps like pre-purchase approvals do not add value (and are actually counter-productive) would be time well spent.

Evaluate Your Process Costs

An efficient P-Card process can feed your organization the savings it craves, but the only way to measure your savings is by evaluating your costs. Do you know your current P2P process costs for P-Card, as well as non-P-Card processes? Most organizations do not, according to a second quarter 2011 NAPCP poll.

Knowing P2P costs can help you identify areas in which your P-Card process could benefit from a makeover. Do not rely on industry statistics that provide cost averages, which may or may not be accurate for your organization. Take the time to
calculate your costs. Begin by documenting each step of the P2P process (purchase initiation through payment), the job position that performs each step and average amount of time (in minutes) it takes to complete each. Calculate the cost per minute for each job position involved (using the average salary plus benefits) and sum for the total.

The ideal P-Card P2P process will cost considerably less than traditional processes. If yours does not, figure out what is weighing it down and then cut the non-value-added activities, as previously indicated, which will also free up staff time and allow better usage of resources.

Be Smart About P-Card Transaction Audits

Auditing practices are another aspect that can bloat your P-Card costs. During the second half of 2011, the NAPCP polled its higher education user group about P-Card auditing practices, receiving input from more than 60 colleges/universities. More than one-third reported manually auditing 100% of cardholders’ transactions each period (e.g., month). The higher education sector is not unique in this way. If this is your organization’s standard practice, consider the cost versus benefit of such an approach.

Manually auditing every transaction for every cardholder every period reduces the process savings inherent to P-Cards. Does your organization really want to spend, for example, $100 (in process costs) to find a minor $20 issue? While public sector organizations tend to have a lower appetite for risk than the private sector (and, therefore, are more tolerant of higher process costs), you can trim the excess and be effective at the same time. Adopt strategic auditing approaches to reap rewards (see sidebar).

The problem with random auditing (e.g., every nth cardholder) is that some cardholders could slip through the cracks each year. The NAPCP’s higher education poll results revealed that only 37% could say their audit process ensured that each cardholder is audited a certain number of times each year. Among this group, half are those who conduct inefficient 100% manual audits. Consider using technology to increase efficiencies. These may include spreadsheets with pivot tables and other functionality, a database for which you have pre-defined queries and reporting options, and robust third-party auditing technology.

Seeking more information on P-Card controls in general? The NAPCP’s Fraud Prevention and Detection report offers sound guidance. Normally available to NAPCP members only, you can obtain the report by becoming a complimentary subscriber today. Visit www.napcp.org/JoinNow and enter “NAEP” in the “How did you hear about NAPCP” field.

Reaching optimal payment health requires a multi-faceted approach, but it’s never too late to get your payment strategy in shape. To help you get your card programs to the next level, also consider NAPCP membership to gain access to a wide variety of tools and resources. Members can join the NAPCP Higher Education User Group (www.napcp.org/UserGroups) to enhance networking within their sector.
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MANUFACTURED IN THE USA
The Jostles and Joys of Getting
Good Things to Distant Lands

by Marilyn McLean
The Church of Jesus Christ of Latter-day Saints

The request seemed simple enough. A Peace Corps volunteer serving in Libya wanted a few things sent to her. I easily purchased and packed into a sturdy cardboard box: bar soaps, toothpaste, a bottle of aspirin, hairspray, and a set of twin-size bed sheets. A trip to the U.S. Post Office, and I experienced my first lessons in international trade. There were only four people ahead of me in line, so the wait wasn’t long. The counter clerk gave me an export tag, as the USPS wanted a complete list of the contents and their costs. Form completed, I was back in line with six people in front of me. I finally arrived at the counter; the clerk checked the destination address and pulled out a heavy book. Upon reviewing the “Libya” pages, he took the export tag and crossed out soap, toothpaste, and aspirin. He told me they were on the “prohibited” list and would have to be removed from the package. Further, the hairspray was considered hazardous and would require special packaging. Rejected (and not a little dejected), I asked for and received the instructions for shipping to Libya. Over the next year, the USPS accepted all my shipments and delivered them to the consignee (the ultimate recipient)—including the hairspray. The packaging I used to ship the hairspray would not pass current hazmat regulations.

Today, just identifying hazardous materials can be a challenge. Chemicals and paint thinners are obvious candidates, but I never suspected a musical instrument. Several years after my hairspray experience, I learned that some musical instruments, such as organs, contain internal speakers that are considered hazardous when shipped via air freight. Likewise, some public address sound speakers contain magnetic fields that are deemed hazardous for aircraft. A reputable, certified Dangerous Goods (DG) professional provided me answers about what constitutes hazardous cargo and the related shipping requirements.

Another time, a freight forwarder helped me get a shipment to a small island in Micronesia. The merchandise was loaded in Utah in a 20-foot-container and railed to the west coast. Upon arrival in Guam (the port nearest to the final destination that could accommodate a large cargo vessel), workers unloaded the container, which was further booked and transferred to an inter-island barge. The barge transited the ocean and anchored at the reef of the destination island. Workers there shuttle, via motorboat, the merchandise across the reef to the beach. From the beach, other workers loaded the goods into a pickup truck—one of two motorized vehicles on the island—and delivered them to the consignee. Everything arrived intact, no freight damage.

Several years ago, I made arrangements to move a 40-foot-container of furniture from Utah to Hawaii. The last pieces of furniture arrived just hours before the container was to be picked up and railed to the west coast. I gave a sigh of relief when I received confirmation that the container had been loaded on the vessel. The ship arrived in Hawaii on schedule, and the consignees had made arrangements with the steamship line to expedite delivery to the site. They had two days to get the furniture in place before the beginning of a well-publicized Open House. While unloading the container from the vessel, the crane malfunctioned and the container plummeted. Not one piece of furniture was salvageable; the shipment was a total loss. Move to Plan B.

Not all shipments arrive. During a single week in January 1996, 250 on-deck containers were lost from vessels crossing the North Atlantic. One of the worst incidents occurred in 1998 when over 800 on-deck containers were lost or damaged, resulting in a cargo loss of approximately $100 million. The number of containers lost overboard is unknown. The good news: Millions of containers, the vast majority, arrive as planned.

An article about a small barge line in Alaska appeared in a popular shipping magazine several years ago. The line owners were looking for backhaul (return trips that are not empty and generate revenue) from Southeast Alaska to Seattle. Under a permit issued by the State of Alaska, they began harvesting icebergs—70 to 80 thousand pounds each—in three tidal glacier areas. In Juneau, another firm broke the ice into large chunks weighing about two-to-three thousand pounds, which could be fork lifted into a 40-foot reefer (slang for refrigerated) container and shipped on to Seattle. There, workers unloaded the chunks, cut them into party-sized cubes, and poured those results into one-kilo plastic bags. Testing of the ice showed that it contained some of the purest water on earth. Millions of pounds of glacial pressure had formed the ice, and so it had virtually no oxygen content. Because of its high density, the ice took much longer to melt than manufactured ice. Alaskan ice cubes, for keeping cocktails cool, moved to Japan at the rate of 100
tons a week. Now that’s creative problem-solving. If you think it’s easy to give things away, think again. During the early 90s, portions of Africa were experiencing extreme drought. The drought and tribal warfare had left many starving. Many agencies in the U.S., including my employer, were anxious to help but wanted assurance that shipments would get to people in need and would not be sold by profiteers. The U.S. agencies had to select African agencies that had proven records. The containers were loaded and manifests were prepared. At that time, Customs in several African countries required a fumigation certificate for shipments containing corn flour. Shipments containing pinto beans required a certified declaration verifying that the beans were free from plant diseases and bacterial wilt. Powdered milk was sometimes the most difficult commodity to give away. Required documentation sometimes included current copies of the State Health Inspection Report on the manufacturer of the powdered milk, and the Dairy Farm and a notarized letter from a veterinarian certifying the cows were disease-free. There are times when standard documentation is not enough. Customs held a shipment of furniture in an Asian country because Customs wanted additional information on the leather used to upholster the items. The reply was simply “cowhide.” They wanted more detail. I contacted the furniture manufacturer and was advised that the leather was “domestic, tanned, cowhide.” Customs still was not satisfied. I contacted the Zoology Department at the local university and they sent me several pages of details about domestic cattle. I forwarded the information to Customs and they cleared the shipment the same day.

A request to ship folding chairs to the Democratic Republic of the Congo was a little unusual but with the help of a freight forwarder, no problem. The chairs arrived at the port and moved inland to Kinshasa where it stopped. There are no roads between Kinshasa and Lubumbashi. If the freight forwarder or I had asked the consignee, we would have been advised to route the shipment via Durban, South Africa, and then rail the shipment direct to Lubumbashi. But since we didn’t ask, we had to air freight the chairs from Kinshasa. The Lubumbashi lesson? Talk with the people who live there.

In less than 40 years, we have moved from manually typing purchase orders with carbon copies to paperless systems. Email and the Internet have opened doors never dreamed of 20 years ago. International business can be complex but the bottom line is simple: Do your homework, think creatively, expect surprises—and the world is your marketplace.
Gaining Control and Visibility of Your Contracts and Spend

By creating an organized online repository of all contracts, you now have complete visibility into terms such as pricing and supplementary costs, allowing you to confirm that your supplier is adhering to the agreed upon terms.

eProcurement is often regarded as an electronic purchasing method for buyers to place requisitions from contracted catalogs. The purchasing portal includes catalogs from contracted suppliers, an approval routing workflow and integration to your organization's ERP finance system. Frequently overlooked in establishing your procurement portal is the importance of a well-managed contract system. However, one of the goals to improve this overall process is to increase contract compliance throughout your organization, by adhering to business rules and making sure your end-users are purchasing from your contracted catalogs. Likewise, your suppliers must also follow the agreement outlined in your purchasing contract. A way to efficiently monitor and manage the criteria set forth in the agreement for both your organization and your suppliers, is to use an automated contract management system, integrated to your purchasing solution.

Suppliers are the fuel for purchasing. Using eProcurement to order products and services from multiple suppliers in a single interface is convenient and easy. Yet, it is only cost-effective if both you and your supplier maintain contractual compliance.

A contract management solution gives you instant-access to all of your contracts in full detail, so that you can dynamically monitor supplier performance based on your specific agreement. Continuously measuring supplier compliance gives the procurement department the ability to identify and correct problems at an early stage. By creating an organized online repository of all contracts, you now have complete visibility into terms such as pricing and supplementary costs, allowing you to confirm that the supplier is adhering to the agreed upon terms.
Additionally, you have immediate visibility into the information you need in order to cover your responsibilities in the agreement, such as renewal dates and approval deadlines. Successfully purchasing from contracted catalogs, but failing to meet contract terms does not create a compliant organization. Fortunately,

the contract management system automatically tracks dates and gives you notifications and alerts about contract updates. You can also receive emails for renewals, milestones and other important dates and deadlines, making it quick and simple to update your agreement.

The lack of easy access to contract information is the explanation often given when procurement departments fail to meet said deadlines. Kevin Stevens, Director of Procurement Services at The University of Alabama, had computers, file servers and filing cabinets full of expired and existing contracts that he had to manually sort through each time he needed to check on a renewal date or verify a catalog. ESM Solutions’ Contract Management application created an organized repository for the university’s contracts and is helping Stevens manage contract lifecycles and track key dates.

“The University of Alabama now has instant and easy access to our contracts from anywhere,” said Stevens. “We can now not only track and search important information with one click, but the data gathered from each contract helps us to identify the right suppliers for our specific purchasing needs.”

The analytical components of your contract management and purchasing solutions increase visibility into your spend by providing information such as top suppliers by spend and top suppliers by number of orders. Purchasing administrators can use this data to choose the right suppliers, leverage contracts and improve future negotiations.

Adding analytics and contract management to the procurement cycle creates a comprehensive and value-based procure-to-pay solution. ESM Solutions’ applications improve the speed, efficiency and control of your procurement process, ultimately improving your bottom line.

Control over your contracts is equally important as control over your spend. By creating an electronic repository of all your contracts and implementing tools to sort and search your information, you will have a fully effective eProcurement process.

For more information on ESM Solutions, visit www.esmsolutions.com or meet ESM Solutions colleagues at this Fall’s NAEP regional meetings.
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If Opportunity Knocks, Will You Be Ready to Open the Door?

by Bob Ashby, C.P.M., CPCM
University of Nevada, Las Vegas (retired)

A recent YouTube video showed a famous singer/songwriter in concert at a college campus. Although I don’t remember his name, I do remember his impromptu Q&A session, in which he asked the audience if there was anything they might want to ask him about his life, about how it is to tour all year long, what he does for relaxation, or what inspires him when writing music.

A student introduced himself, said he was a senior in the Music Department, was a pianist, and knew every one of the singer’s hit songs. Then, the student boldly and brazenly asked if he could accompany the singer on stage as he sang his next song. Wow, I thought, how gutsy! The singer hesitated, then, without a smile on his face, said, “Sure, come on up.” While students howled, the kid walked up, introduced himself again, and asked what song they were going to do. The look on the singer’s face said he knew he was about to do the most embarrassing thing he had ever done. He had “stepped in it” and knew there was no way he was going to come out smelling like a rose. The singer named the song, the kid started the intro, and the singer’s face broke into a wide grin. The kid could play! They then had an impromptu jam session, the old pro and the unknown walk-on. They had a great time. The audience went wild. The singer, absolutely beaming because he had just witnessed this lump of coal turn into a diamond, re-introduced the kid to the audience. He gave him a hug and told him he had a great future in the business.

This video was memorable to me because it demonstrated the rewards when one is prepared for just such a moment, is nery enough to ask for an opportunity, and—in an all-or-nothing moment—is willing to put his/her future on the line. This student’s preparation paid off and he became an Internet sensation.

In previous articles, I told of employees who assured me that if I would just give them a promotion, they would show me how great they could be. They, unlike this virtuoso, were not willing to start their preparations until opportunity actually knocked on the door. And they missed out when an opportunity presented itself.

That video reminded me that recently I heard opportunity knock and found I was not prepared to open the door. As most of you know, upon retiring from UNLV, I took up marathon running as a way to raise more cancer research money for the Leukemia and Lymphoma Society. Since I have successfully completed 14 races, I was asked if I wanted to expand my horizons and do an Olympic Distance Triathlon; i.e., nine-tenths of a mile swim, 24-mile bike ride, and a 6.2-mile run. Since the running mileage is no longer a challenge, I figured all I had to do was to build up my stamina for the swimming and biking stages of the race. And since I know how to bike and swim, I decided I could do this without the benefit and cost of hiring a coach. The opportunity was there and I was going to grab it!

In addition to my daily running, I started swimming in an Olympic-length lap pool three times per week. Nine tenths of a mile swim is the equivalent of swimming 60 laps in the pool, so I built up to that level. For the biking, I started riding twice a week. I only used the bikes in the gym, figuring I would buy a road bike after I had built up my stamina. Besides, it is hot in Las Vegas and I did not want to over-exert myself in the hot sun.

After achieving a stamina level that allowed me to swim 60 very slow laps in the pool (and holding on for a second or two every time I got to the end of one lap so I could catch my breath), and riding 10-12 miles on the gym bike, I asked some triathlete friends to check my progress. First thing they did was to take me out to Lake Mead for a swim. The Lake temperature was 59 degrees and, even with a wet suit on, that was cold. Second, they tied a floating buoy around my waist so if I got in trouble I would not drown. It irked me that they were treating me like a baby who had never swum before! The buoys were 150 yards apart. We swam out to the first one. Then we swam to the second. Then to the third, and then the fourth. I was shot. I had to signal that I was going in—another 150 yards—very grateful for the little life-saving buoy attached to my waist. I had only gone 750 yards and that equaled only 30 laps in the pool. How could I be so shot, I wondered, when I was only half way to the 60 laps I was used to swimming in the pool?

I wasn’t given much time to ponder that, since I had to slowly crawl out of the wet suit and jump on my bike. “Jump” might be an exaggeration because actually I very slowly pulled myself onto my bike. Thankfully, they had mercy on me and didn’t make me go for a run. Whew, I was beat.

The worst part, though, was when my triathlete friends said they’d meet me the next day at the pool and “teach you to swim.” But I did show up as instructed. They demonstrated my pleaser-God-don’t-let-me-drown technique versus

Continued on page 23
Thinking Deeper About Technology Implications

by Brian K. Yeoman
NAEP

What a convenient time to be examining technology. The world’s largest publicly traded company by market valuation is now Apple. Imagine that! Apple is bigger than Exxon Mobil and Royal Dutch Shell. Apple is also bigger than Microsoft and Google combined! Ponder it a little while, and I think you will agree how amazing and awesome it is.

It is not that long ago that, in a garage in California, a couple of young and curious people created the Apple computer. Those humble beginnings did not staunch the flow of innovation and creativity for which the company is now permanently branded. Recently, an original Apple computer in pristine condition sold for more than $671,000.

Do we conclude that, in the intervening years of all of those machines being made and sold, it has led to a case that we can definitively say that the differences between that original Apple I and the MacBook Air are revolutionary? I think not, and so does Apple, fortunately, because they continue to be driven to innovate. True revolutionary change in commercial matters rarely happens in current times, but evolution—the survival of the corporation—is never off the company’s agenda. Rarely is risk-taking so bold as to put the corporation at risk. Revolutionary change means big risks, and that is not what we have in today’s world.

We have Moore’s Law to thank for the current condition. Lest you have forgotten, Intel co-founder Gordon Moore first articulated the law in 1965. It states that the number of transistors on a chip will double approximately every two years. That is evolution, not revolution. Intel has maintained this pace for decades. It uses the “Law” as its golden rule, serving both as a guiding principle and a springboard for technological advancement, driving the expansion of functions on a chip at a lower cost per function and lower power use per transistor. It does this by shrinking feature sizes while introducing new materials and transistor structures. The Law is nearly 50 years old, and it remains the design paradigm for the world’s leading computer-chip manufacturer.

This plays out throughout the technology sector. Take a trip through Microsoft operating systems: Windows, Windows XP, Vista, Windows 7, and Windows 8. I doubt that any of your information technology departments seized upon each and every latest-and-greatest release (excusing the myriad updates that relentlessly eat up more hard-drive space and memory). Essentially, we are merely “changing the colors of the lipstick on the pig.”

Ok, I can hear some of you crying, “What about the iPod, the iPad, and the iPhone?” Significant changes, yes. But revolutionary? I say, no. We are still listening to music, entering data, sending mail, calculating stuff—and we are using basic math to accomplish it all. We are still dialing telephone numbers and talking on devices. Now granted, in each of these examples there have been bolt-on technologies that are “cool,” but what went away or what behavior was altered forever by the technology?

Technology is ubiquitous. We are obsessed with it. I say it is the most overused word in the English language. The endless string of marketing claims about what this product’s technology can do to solve problems creates a never-ending struggle for procurement professionals. There is not a lot of help out there because almost everyone is involved in the game of trying to “out-tech” the next person. But is there true, fundamental improvement?

It is difficult to attend any professional development event for which you don’t have at least one speaker proclaim, “You cannot manage it if you do not measure it.” Sounds really powerful the first 500 times you hear it. And then you begin to ask yourself a whole lot of questions, like: “What are we measuring in our spending decisions to keep investing more and more in technology?” I firmly believe we are not measuring much, if anything, related to the technology cost-benefit tradeoff.

When we are making those spending decisions are we deeply investigating the technology? Do we understand its implications and consequences? Are we applying a robust Life Cycle Assessment that allows us to evaluate the decision from a number of critical control factors? If we can identify the consequences, do we understand them,
Consider the cell phone and its evolution into the smart phone. Who would have thought that so many human beings would be killed with this technological advancement? Talking and texting has turned into an epidemic. Many states have passed—and are passing—laws that prohibit talking and texting; cities are passing similar ordinances. The impact falls disproportionately on our youth—the future, the continuation of our species—and we have put them at risk with technology. Yes, one can argue that it is not the technology doing the killing, but the fact remains that, prior to the smart phone, we did not “kill anyone” with a desktop computer or a landline telephone.

This said, I don’t suggest a Luddite world with no technology. We should, however, adopt ardent support for robust risk-analysis when procuring technology. I am not advocating that we prohibit the evolution of technology in our great corporations. They are the wonderful engines of ingenuity that drive our exceptionalism and allow us to increase the quality of life in the rest of the developed world.

There is no surefire, silver-bullet answer when it comes to technology assessment. There is mystery well beyond our knowing. Realizing this, should we not make a much better attempt at understanding? We will have to fight our basic nature to judge all situations based upon the here and now, and expand our thinking to future generations. We simply do not know how it is going to turn out. The plea to procurement professionals is, therefore, to accept that our limited current conventional wisdom provides us with no ability to know what the future holds. So—please ask lots of questions, be bold, and think deeply.

The plea to procurement professionals is therefore to accept that our limited current conventional wisdom provides us with no ability to know what the future holds. So—please ask lots of questions, be bold, and think deeply.

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Okay, this isn’t funny.
How long is a decision?
Well, maybe the question is a little funny. I mean how much time is there from when a person makes a decision until there is a consequence? Most decisions are really short. You go to Starbucks. You forget the word for “big” is “venti,” so you just order a “humongous” latte. You pay your money. And shortly, your latte is delivered. Some decisions are really long. You go to college. You get student loans. You believe you will be better off with a college degree, even with significant student debt. It may take a long time before you know whether you were right. It might even take five years just to graduate.

What about really long decisions? On May 10, we reached 400 parts per million of CO₂ in our atmosphere, a level not seen before. By 2050, the sea level is expected to be at least one foot higher than it is now. Our climate is changing, and it is human-caused, and can be human-corrected. But what do I care? I live in the desert. The potential consequence is so far away that it is not meaningful to me.

And that brings me to my point: If I want people to choose wisely, I will have to shorten the length of the decision by making the consequences at least seem closer.

Congress has tried to do this. You probably know that the last time the Senate passed a budget was on April 29, 2009. At the same time, there is a general concern about the national debt, but no agreement as to how this concern should be resolved. In an attempt to force the issue, the Congress passed the Budget Control Act of 2011 that said if no budget agreement was reached by December 31, 2012, then automatic across-the-board budget cuts would take effect on January 1, 2013. This date was delayed until March 1, 2013 by the Taxpayer Relief Act of 2012. These automatic budget cuts, known popularly as sequestration, are now in effect. In essence, the Congress moved a long-term consequence, a large national debt, closer to the immediate decision on a budget in the sequestration.

You do have to hand it to the Federal Aviation Administration. By announcing that the consequence of sequestration would be long delays for air travelers, Congress promptly gave them relief. The other federal agencies are probably looking for equivalent consequences.

The length of a decision is a big issue for sustainability. We want people to decide responsibly now to avoid consequences far in the future. The selling points for sustainability must be more immediate. Something like: Switching to compact fluorescent light bulbs CFLs will save $x per year. Actually, others say it more eloquently: “According to the Union of Concerned Scientists, if every U.S. household replaced just one regular incandescent light bulb with a compact fluorescent bulb, it would prevent 90 billion pounds of greenhouse gas emissions from power plants, the equivalent of taking 7.5 million cars off the road. And the U.S. Environmental Protection Agency says that by replacing regular light bulbs with compact fluorescent bulbs at the same minimal rate, Americans would save enough energy to light more than 2.5 million homes for a year.” (about.com)

Finally, we come to us in purchasing. If we want people to choose to use our contracts instead of buying some maverick product, or choose the sustainable product over the toxic one, we need to ensure that the consequence at least appears to be close to their decision. Isn’t that why we provide department scorecards and do department visits—to praise advantageous behavior and point out concerns with disadvantageous behavior? Isn’t that why we send out an email to every new cardholder to ask about a transaction—so they know there could be imminent consequences for their purchasing card decisions?

You can probably think of other situations in which you want to shorten the length of a decision. Have fun with it.
their fluid, energy-saving motions. I realized they were right; I didn’t really know how to swim. And, thinking of my struggles on the bike, I realized I didn’t know how to ride a road bike either. I was truly humbled.

So, what is the difference between the first story and the second? In the first story, the young college student understood that if he wanted to be ready to open that door when opportunity knocked, he needed to be prepared. He also realized that he could not teach himself the piano. He then surrounded himself with coaches, trainers and experts who had already walked in the steps he wanted to take, had previously gone through the process he was now undertaking, and had shown an ability to prepare folks to respond to that sound of opportunity knocking. That is, he prepared, prepared, prepared.

In the second story, you read about someone who had never tried a particular event before, decided he could self-teach himself, did not search out any experts to help him prepare, and who ended up woefully under-prepared to answer the door when opportunity knocked. Fortunately, in this second story, the fool (me) caught on in time that he could not take that triathlon test without coaching, sought out the necessary help, and is now on track to successfully challenge that triathlon in March 2014.

What does all this mean to you? Hopefully, you understand that the ones who get ahead, who get the grand prize, who get the good jobs, and who get the promotions, are the ones who are prepared. In our profession, that means proving to your existing and/or future bosses that you have prepared yourself educationally and professionally so that when opportunity knocks, you are ready to answer the door. Hopefully, you will also recognize that it is a rare individual who can teach him/herself to get ready. Last, but equally hopefully, you will recognize that NAEP is the expert coach in this instance and is standing by, waiting for you to take advantage of its many educational opportunities. Coaches like to see their students succeed. But no student will succeed until he/she starts a training program. Are you ready to start? Ask NAEP for the necessary help and coaching. Don’t let the knock go unanswered.

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