Educational Procurement
JOURNAL
NATIONAL ASSOCIATION OF EDUCATIONAL PROCUREMENT

2010 Annual Meeting Issue Including Buyer’s Guide

In This Issue
Evaluation or Revolution?
Large Response Packages
Are Your Cardholders Certifiable?
Notes from Climate Leadership Summit

Pictured above: Denver Capitol Building
Savings made simple. Campus-wide.

Do you see things you need? Or just a better way to buy them? We’ve already completed the bids, secured the best prices, and signed the contracts for everything you can imagine. In fact, the members of the National Association of Educational Procurement (NAEP) have turned to E&I since 1934 to increase buying power, streamline purchasing, and satisfy the needs of their institutions and students. See what we can do for you. Call 800-283-2634 ext. 228, e-mail membership@eandi.org, or visit www.eandi.org today.
Attractively styled and attractively priced, Virco introduces the new Parameter™ desk series by award-winning designers Peter Glass and Bob Mills. Parameter desks, returns and credenzas – along with Virco’s great selection of storage options – help create a harmonious setting for teachers, students and administrators.

Call us today at 800-813-4150 or visit www.virco.com
EXACTLY what you want.

“Hand-pick” your purchases.
You know what you’re looking for...so reach out and grab it.
With NJPA’s national, competitively bid contracts, you can get the brands you prefer, exactly when you want them.

NJPA Contracts are competitively bid on your behalf.
A no-cost, no-obligation Membership is all you need to hand-pick your products from the “best of the bunch.”

Join today at www.njpacoop.org.

www.njpacoop.org

Competitively Bid Contract Purchasing Solutions

[Logos of various companies]
From Challenge to Opportunity: Elevating the Role of Procurement on Campus
Nicole Katz
In this down economic time, the importance of procurement to an institution’s financial survival has increased dramatically. The C-suite is noticing, and now is the time for procurement officers to garner the respect and acclamation they deserve.

Reaching New Heights: Gain Altitude with E-Procurement
Julie Hepner
E-procurement is one of the most important factors in elevating the purchasing function from a tactical to a strategic unit within the organization. It can provide the lift needed to get to the requisite altitude.

Evaluation or Revolution? One School’s Experience with Large Response Packages
Ramon S. Bristol Castrillon, CPPO
No doubt we’ve all had the problem of distributing multi-volume RFP responses all over campus to the evaluation team members. This article highlights a much better, faster, and more sustainable way to get that task accomplished.

Are Your Cardholders Certifiable?
Lesley Lackore, CPCP
Compliance problems in P-card programs have given many an institution a black eye and have caused no small measure of grief and embarrassment. A great way to maximize compliance is through a user certification curriculum.

Lead, Follow, or Risk Losing a Whole Bunch of Students: Notes from the 2009 Climate Leadership Summit
Ray Jensen, C.P.M.
Ignoring the sustainability movement is done at one’s own risk. Today’s students demand sustainable campuses. Fortunately, within NAEP, we have many excellent champions and resources to help with our sustainability struggles. This article provides a thorough report on the recent Leadership Summit in Chicago held by the American College and University Presidents Climate Commitment.

Are Your Cardholders Certifiable?
Lesley Lackore, CPCP
Compliance problems in P-card programs have given many an institution a black eye and have caused no small measure of grief and embarrassment. A great way to maximize compliance is through a user certification curriculum.

Roamin’ with Yeoman
Brian Yeoman
Something a little different from our Raging Inexorable Thunderlizard for Change: A test! Take it. See how you score.

Best and Final
Craig Passey, C.P.M.
Living the life of a Procurement professional is easier if one has a sense of humor. From vampires to rock groups to paperless toilet stalls, you’ll get plenty of chuckles from this B&F.
UPCOMING WEBCASTS/ON-DEMAND WEBCASTS

**Coming in March!**

**Live from Denver with NAEP’s virtual education**

The following sessions will be recorded LIVE from Denver and will be available on-demand from www.naepnet.org (http://www.naepnet.org/) to Members for download within 12 hours of the end of the session.

- **Best Practices with Suppliers** presented by Sandy Hicks, CPPB (NAEP’s Senior Vice President and Assistant Vice President & Chief Procurement Officer at the University of Colorado), Howie Aroesty (Regional Sales Director at Staples Advantage), James Knight (Managing Director at Huron Consulting Group), and J.T. McGuire (Industry Director, Sales, at Fisher Scientific)

- **An Interview with Leaders: Their Thoughts & Journeys** presented by Joyce Haney (Director of Procurement Services at Pennsylvania State University)

- **Req to Check—Live in the Trenches** presented by Dennis Fox (Procurement Director at Woods Hole Oceanographic Institution), Paul McGowan (Director of Procurement at Boston College), Debbie Reynolds (Director of Purchasing at University of North Texas), and Jack Zencheck, C.P.M. (Chief Procurement Officer at Yeshiva University)

- **They Told Us Where to Go** presented by Nancy Brooks, MPA (NAEP’s Immediate Past President and Director of Purchasing at Iowa State University), Jim Hine (Executive Director & Material Manager at University of California, San Francisco), Rob Kelly, C.P.M., CPIM, C.P.S.M. (Director ofProcurement Services at the University of Notre Dame), and Judith Smith (Director of Procurement at the University of Michigan)

- **American Recovery and Reinvestment Act: Resources for Higher Education** panel discussion will be presented by Chris Mellis (Program Manager with U.S. Communities), Keith Vos (National Sales Director with The Home Depot), and Bob Wood (Interim Associate Vice Chancellor, Campus Enterprises at North Carolina State University)

**American Recovery and Reinvestment Act: Resources for Higher Education** panel discussion will be presented by Chris Mellis (Program Manager with U.S. Communities), Keith Vos (National Sales Director with The Home Depot), and Bob Wood (Interim Associate Vice Chancellor, Campus Enterprises at North Carolina State University)

**NAEP Diversity Conference**

**August 1-4, 2010 at the Hilton Providence**

Providence, Rhode Island

For more information, visit www.naepnet.org or contact jharget@naepnet.org.

**2010 Fall Regional Meeting Schedule**

<table>
<thead>
<tr>
<th>REGIONS</th>
<th>MEETING DATE</th>
<th>CITY/STATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metro NY/NJ*</td>
<td>September 15–17</td>
<td>Gettysburg, Pennsylvania</td>
</tr>
<tr>
<td>DC/MD/VA*</td>
<td>September 15–17</td>
<td>Gettysburg, Pennsylvania</td>
</tr>
<tr>
<td>DE/PA/WV*</td>
<td>September 15–17</td>
<td>Gettysburg, Pennsylvania</td>
</tr>
<tr>
<td>Great Lakes</td>
<td>October 6–8</td>
<td>Indianapolis, Indiana</td>
</tr>
<tr>
<td>Upstate NY</td>
<td>September 28– October 1</td>
<td>Brockport, New York</td>
</tr>
</tbody>
</table>

*Combined meetings
NAEP’s Procurement Network Career Center is providing targeted access to the most qualified procurement professionals.

We can deliver those jobs and those candidates — Introducing the NAEP Procurement Network Career Center. In collaboration with several other associations that focus exclusively on higher education, our new career center offers a targeted approach to finding the right procurement job or securing the right candidate for your procurement needs.

NAEP’s Career Center will make your search efficient, targeted and most of all, cost effective! It’s free for NAEP Members to post a resume, and our employer posting opportunities are priced such that a 30-day program would cost half of what you’d spend on one advertisement in a local or national paper. It’s targeted and it’s working for you, 24/7.

So don’t miss out — check it out today!

Go to [http://careers.naepnet.org](http://careers.naepnet.org) to post a resume or create an account.
LETTER FROM THE CEO

2010: The Year You Make Contact

If challenge breeds character, 2009 should have made us all really big characters! I am really looking forward to 2010. It has to be better than 2009, right?

Here is some good news. You have lots of help to thrive in these challenging times. I am, of course, speaking about the resources available through your Association, NAEP. Key ingredients to our individual success are the market intelligence, professional development, and collective body of knowledge of our peers available through NAEP. Here is how your Association is helping you.

Recent upgrades to our technology infrastructure deliver a more robust and friendly web experience including downloadable research, webcasts, and an online Career Center, which is part of a network that includes positions posted through some of our sister associations (NACAS and NACUBO). NAEPnet.org also is host to multiple document libraries where Members can share RFPs, Procedural Manuals, and Position Description samples.

We have a number of research projects lined up to give you the intelligence you need to make informed, effective decisions about your work and your career. These include the American Association of State Colleges and Universities’ collaborative survey on cost containment, a best practices survey in association with the Education Advisory Board, the study on the value of certification with the National Institute of Governmental Purchasing and the National Council for Public Procurement and Contracting, a 2010 salary survey, and 2010 Sustainability Benchmarks. We round out our body of knowledge with research that includes white papers, monographs, and flash poll results.

NAEP’s ever-expanding body of knowledge provides professional support for your evolving role on campus. This includes face-to-face learning, web-based learning, research, publications, communities of practice experts, and a variety of listservs that provide real-time access to the largest network of higher education procurement professionals in the country.

The Educational Procurement Journal is truly the voice for procurement in higher education. Procurement professionals leverage the Journal to convey solutions to higher education procurement challenges, publicize innovations, and communicate best practices to their colleagues. Solutions providers also leverage this important platform to elevate awareness, share intelligence, and engage with the NAEP.

And beginning with this issue, we have a new publishing partner—Apogee Publications. We selected Apogee for its outstanding professionalism and its extensive expertise and experience in association publishing. We are confident that the professionals at Apogee will provide you with exemplary service, and with our Member-driven editorial team, will continue to deliver a top-quality publication in both print and digital formats.

We are extremely grateful to all of our Members and all the distinguished organizations, which through a solid commitment to higher education procurement have helped our community thrive.

So here’s to a good start in 2010 with your Association behind you and out in front, all the way!

Doreen Murner
CEO, NAEP

LETTER FROM THE CEO

2010: The Year You Make Contact

If challenge breeds character, 2009 should have made us all really big characters! I am really looking forward to 2010. It has to be better than 2009, right?

Here is some good news. You have lots of help to thrive in these challenging times. I am, of course, speaking about the resources available through your Association, NAEP. Key ingredients to our individual success are the market intelligence, professional development, and collective body of knowledge of our peers available through NAEP. Here is how your Association is helping you.

Recent upgrades to our technology infrastructure deliver a more robust and friendly web experience including downloadable research, webcasts, and an online Career Center, which is part of a network that includes positions posted through some of our sister associations (NACAS and NACUBO). NAEPnet.org also is host to multiple document libraries where Members can share RFPs, Procedural Manuals, and Position Description samples.

We have a number of research projects lined up to give you the intelligence you need to make informed, effective decisions about your work and your career. These include the American Association of State Colleges and Universities’ collaborative survey on cost containment, a best practices survey in association with the Education Advisory Board, the study on the value of certification with the National Institute of Governmental Purchasing and the National Council for Public Procurement and Contracting, a 2010 salary survey, and 2010 Sustainability Benchmarks. We round out our body of knowledge with research that includes white papers, monographs, and flash poll results.

NAEP’s ever-expanding body of knowledge provides professional support for your evolving role on campus. This includes face-to-face learning, web-based learning, research, publications, communities of practice experts, and a variety of listservs that provide real-time access to the largest network of higher education procurement professionals in the country.

The Educational Procurement Journal is truly the voice for procurement in higher education. Procurement professionals leverage the Journal to convey solutions to higher education procurement challenges, publicize innovations, and communicate best practices to their colleagues. Solutions providers also leverage this important platform to elevate awareness, share intelligence, and engage with the NAEP.

And beginning with this issue, we have a new publishing partner—Apogee Publications. We selected Apogee for its outstanding professionalism and its extensive expertise and experience in association publishing. We are confident that the professionals at Apogee will provide you with exemplary service, and with our Member-driven editorial team, will continue to deliver a top-quality publication in both print and digital formats.

We are extremely grateful to all of our Members and all the distinguished organizations, which through a solid commitment to higher education procurement have helped our community thrive.

So here’s to a good start in 2010 with your Association behind you and out in front, all the way!

Doreen Murner
CEO, NAEP

LETTER FROM THE CEO

2010: The Year You Make Contact

If challenge breeds character, 2009 should have made us all really big characters! I am really looking forward to 2010. It has to be better than 2009, right?

Here is some good news. You have lots of help to thrive in these challenging times. I am, of course, speaking about the resources available through your Association, NAEP. Key ingredients to our individual success are the market intelligence, professional development, and collective body of knowledge of our peers available through NAEP. Here is how your Association is helping you.

Recent upgrades to our technology infrastructure deliver a more robust and friendly web experience including downloadable research, webcasts, and an online Career Center, which is part of a network that includes positions posted through some of our sister associations (NACAS and NACUBO). NAEPnet.org also is host to multiple document libraries where Members can share RFPs, Procedural Manuals, and Position Description samples.

We have a number of research projects lined up to give you the intelligence you need to make informed, effective decisions about your work and your career. These include the American Association of State Colleges and Universities’ collaborative survey on cost containment, a best practices survey in association with the Education Advisory Board, the study on the value of certification with the National Institute of Governmental Purchasing and the National Council for Public Procurement and Contracting, a 2010 salary survey, and 2010 Sustainability Benchmarks. We round out our body of knowledge with research that includes white papers, monographs, and flash poll results.

NAEP’s ever-expanding body of knowledge provides professional support for your evolving role on campus. This includes face-to-face learning, web-based learning, research, publications, communities of practice experts, and a variety of listservs that provide real-time access to the largest network of higher education procurement professionals in the country.

The Educational Procurement Journal is truly the voice for procurement in higher education. Procurement professionals leverage the Journal to convey solutions to higher education procurement challenges, publicize innovations, and communicate best practices to their colleagues. Solutions providers also leverage this important platform to elevate awareness, share intelligence, and engage with the NAEP.

And beginning with this issue, we have a new publishing partner—Apogee Publications. We selected Apogee for its outstanding professionalism and its extensive expertise and experience in association publishing. We are confident that the professionals at Apogee will provide you with exemplary service, and with our Member-driven editorial team, will continue to deliver a top-quality publication in both print and digital formats.

We are extremely grateful to all of our Members and all the distinguished organizations, which through a solid commitment to higher education procurement have helped our community thrive.

So here’s to a good start in 2010 with your Association behind you and out in front, all the way!

Doreen Murner
CEO, NAEP
Can Socialization Help?

by Cory Harms
Iowa State University

One of the best parts of the annual and regional meetings is the socialization. Many outsiders talk about the uniqueness of the organization—how easily ideas are shared and how the group seems like a big family. This is so genuine and effortless at the meetings, yet sometimes not so within our own purchasing departments.

When I started in purchasing 11 years ago, about the only social event we had was our holiday lunch. Though it was always fun, socializing outside work was not something we frequently did. We might get together once during the summer, but other than that we all lived our own lives.

A few years ago, after reading an article in the NAEP Journal about having fun at work, our department decided to put together an Events Committee. We wanted to build a cohesive unit—more like a family. Starting out, the events were typically food-related, like lunches or ice cream breaks, and were held in our offices during the workday. More recently, we’ve added games, like a football toss through a hoop, turkey bowling, or shooting Velcro darts at a cloth turkey for Thanksgiving. We’ve added small prizes to make it more fun, and it is funny how competitive people get when a prize is at stake. These events are fun and the games do bring people together, but we were apparently looking for something more to “strengthen the team.”

The addition of new staff has changed the dynamic agreeably, and socializing is more natural to them as part of work. More and more, people go to lunch and out after work together. We started volleyball nights, bowling nights, and are tentatively planning our first after-hours holiday party.

I believe these social gatherings are having a positive impact on our workplace. I see people becoming more comfortable with each other, talking more, sharing ideas, working together.

For a period of time prior to starting these events, new employees would start and then leave because they weren’t happy. They never identified with the department and left after short stints with us. These events are helping us work better together as a team—to see each other as people, not merely as co-workers and supervisors. Too much socialization can ruin the environment, so there is a healthy balance that needs to be maintained, especially as it may be valued by our younger workers.

Some of you may be way ahead in using social interaction to build teams. Others may be facing dealing with the issues described here and wondering how to get started. My advice is just start. Plan some events, use games, and look for opportunities for after-hours get-togethers. Who knows? You may learn to like one another more than you ever imagined.

Cory Harms is Associate Director of Purchasing at Iowa State University. He is a Past President of the MINK (Missouri, Iowa, Nebraska and Kansas) Region and serves on the NAEP Editorial Board. He has presented at both regional and national NAEP meetings and has spoken for the Missouri Association of Public Purchasing (MAPP). E-mail: clharms@iastate.edu.
**Altitude**

**at the 2010 Annual Meeting**

**March 21st-24th, 2010**

Colorado Convention Center, Denver, Colorado

REGISTER TODAY AT NAEPNET.ORG

For full program information visit NAEPnet.org/AM2010

---

**CONSIDER A ONE-DAY PASS!**

Exhibit hall only, single-day registrations and special event passes are available!

<table>
<thead>
<tr>
<th></th>
<th>Member</th>
<th>Non-Member</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Registration</td>
<td>$625</td>
<td>$625</td>
</tr>
<tr>
<td>Two-Day Pass</td>
<td>$490</td>
<td>$590</td>
</tr>
<tr>
<td>One-Day Pass</td>
<td>$245</td>
<td>$295</td>
</tr>
<tr>
<td>Exhibit Hall Opening</td>
<td>$60</td>
<td>$60</td>
</tr>
<tr>
<td>Exhibit Hall Pass (Tuesday)</td>
<td>$30</td>
<td>$30</td>
</tr>
</tbody>
</table>
According to an ancient Chinese proverb, “A crisis is an opportunity riding the dangerous wind.” These words hold a special meaning as today’s higher education institutions walk the fine line between financial crisis and unprecedented opportunity.

At a time when cost matters most, there are real implications for campus procurement professionals. As budgets tighten and endowments are slashed, it becomes increasingly important for these individuals to elevate their role from a transactional purchasing function to one of strategic value-added. In doing so, many procurement officers are finding new and innovative ways to meet the larger goals of their institutions.

Crisis Can Often Have Value, Because It Leads to Growth

“Change is always hard,” said Barry Swanson, Associate Comptroller and Director of Purchasing at the University of Kansas. “The goal is to see beyond the short-term pain and realize the long-term rewards.” Several task forces have been created at UK to examine potential organizational changes that will achieve efficiencies while improving service and compliance. “If there is a silver lining to the current budget woes, it will be the transformational changes that will undoubtedly emerge,” Swanson said.

Change is already on the horizon at the University of Florida. UF has experienced budget cuts of more than $100 million over the past two years. “It isn’t all bad news,” said Lisa Deal, Director of Purchasing Services at the University of Florida. “The tough economic situation has actually paved the way for many procurement projects that were, for one reason or another, rejected in the past.”

New ideas, including developing a specific list of pre-approved furniture, pre-set “bundles” of computers, and standardizing and/or centralizing the management of copiers, have all been given renewed consideration at UF. “UF is fortunate to have senior-level support for enterprise-wide cost-saving initiatives,” Deal explained. “Most recently, our CFO agreed to fund the University’s participation in a data collection effort, which will generate reports to individual departments detailing the dollar amounts that are lost when these departments do not purchase from UF contract vendors.”

In tough economic times like these, procurement officers would be wise not to underestimate the value of executive leadership buy-in and support. At the University of Missouri System, executives receive a monthly communication detailing each department’s savings through appropriate use of e-procurement, as well as losses through inappropriate use of p-cards made outside Missouri’s “Show-Me-Shop” virtual marketplace.

“Through regular reporting and communication we are able to engage our executive leadership and arm them with the information they need to not only understand what is happening in procurement, but to support it,” explained Bill Cooper, University of Missouri Management Services Associate Vice President and Chief Procurement Officer.

Cooper emphasizes that this support becomes infinitely more important when it’s time to roll out a new initiative. “When we’re looking at introducing a new program or idea, we always start at the top,” Cooper said. “Before we even talk to the end-users, we get the buy-in of executive leadership. We need to know that they will be vocally and visibly supportive of whatever it is we’re talking about.”

In addition to getting the buy-in of executive management, procurement should also focus on being well perceived throughout the entire institution.
Our value proposition constantly needs to be articulated and marketed to the various stakeholders on campus,” Cooper explained. “To that end, we’ve got to understand the critical success factors unique to each of these stakeholders, and we’ve got to clearly communicate what benefits procurement provides to all of them. How we position our department significantly impacts our ability to take it from a transactional back office function into what it truly is.

Especially in a down economy, it is imperative for procurement to consistently demonstrate its impact on the bottom-line. “What this says to me,” said Tom Kaloupek, Director of Materials Management at Virginia Polytechnic Institute, “is that procurement needs to be actively looking for new revenue streams and demonstrating that we are not only reducing costs, but also bringing in revenue.”

Especially in a down economy, it is imperative for procurement to consistently demonstrate its impact on the bottom-line.

Virginia Tech is looking closely at its payables methods to try to gain the flexibility to take greater advantage of prompt pay discounts, obtain new discounts for e-invoicing, and implement the use of a “ghost card.” Typically designated for use by a single department, ghost card accounts do not involve the use of an actual card. Instead, each department is assigned its own ghost card number and all purchases made with that number are charged back to the department. By centralizing purchases with a single account number, purchasing managers can easily track and reconcile all account activity. Though still in the investigative stages, Kaloupek believes that implementing a ghost card program could potentially yield a new revenue stream for Virginia Tech.

Opportunities to uncover new sources of revenue are invaluable. “I believe it is absolutely necessary to establish ourselves us as a revenue center on campus,” Cooper said. “To me, that is fundamentally what makes us strategic—the fact that we can, by virtue of what we do and how we do it, effectively generate revenue. That revenue is then available to be reallocated to the core mission of the institution, and that message resonates.”

The University of Missouri is in the process of investigating a number of innovative revenue sources including “dynamic discounting” a process that allows buyers and suppliers to change the agreed upon payment terms to accelerated payment based on a sliding discount scale. In most cases, the early payment discount reduces over time, reaching zero when the payment due date approaches. Suppliers determine the level of discount they are willing to offer, and buyers receive a portion of the finance charges incurred by the supplier. Dynamic discounting provides purchasing with a tool to leverage greater discounts from suppliers, in addition to providing a new revenue stream.

E-procurement Technologies Offer Higher Education the Opportunity to Realize Their Full Strategic Potential

Many higher education institutions consider e-procurement technology a valuable tool in the strategic toolbox, and it's easy to see why. Bringing e-procurement to campus can significantly improve process efficiencies by eliminating paperwork, speeding up contract fulfillment and controlling contract compliance. Combined, these advantages mean valuable savings across the board.

For Virginia Tech, the SciQuest e-procurement platform has produced measurable efficiencies in many areas, not just in product cost savings. “Having an established marketplace and improved budgetary controls is especially valuable,” said Kaloupek. “On top of that, our internal administrative processing is much more efficient due to the ease of formulating the order and source data capture. We are also using the system to deliver orders to internal suppliers, such as the physical plant, the copy centers, testing labs, etc.”

In May 2009, the University of Florida also implemented SciQuest, due to the program’s ability to deliver electronic catalog and requisitioning capabilities, without having to manage each catalog integration point. “SciQuest also provides the ability to customize workflow,” said Deal. “This has allowed us to reduce approval actions, streamline the approval process, and still maintain appropriate controls.”

On average, SciQuest’s customers realize a five to 25 percent decrease in the cost of goods and services. This is possible because the program enables procurement’s use of strategic procurement techniques and the enforcement of contract compliance. Savings generated through contract compliance at UF exceeded $12,000 this past year, and Deal is confident that’s just the beginning. “We have only scratched the surface in this area and are hopeful that increasing the number of available electronic catalogs will decrease our time spent on compliance centered tasks,” she explained.

The University of Missouri System has taken e-procurement a step further. The System is currently in the process of entering into a shared-services agreement, linking their e-procurement platform with the five hospitals and more than 20 clinics of the University of Missouri Health Care System.
Currently, the area hospitals are operating with a procurement reporting system that does not communicate with that of the University System. Cooper and his team are putting together an ambitious plan to bring these hospitals into the University System’s electronic marketplace, effectively leveraging spending across the entire enterprise. This combined purchasing power is likely to drive down costs as well as drive up leverage with suppliers.

“Take, for example, our contract with Fisher Scientific,” said Cooper. “Fisher has departments that deal exclusively with the hospitals, and other departments that deal exclusively with the university. It turns out we’re ordering from two completely different contracts when, in many cases, we’re ordering the same items. We believe there are significant time and cost efficiencies to be realized through the aggregation of this purchasing volume.”

**Sometimes It Pays to Think—And to Go—Outside the Box**

Based upon legislation, the University of Kansas has historically been required to purchase exclusively from state contracts, despite advantageous prices that might be available through other sources. Swanson and his team set out to change that by initiating an innovative pilot program aimed at improving efficiencies and reducing spend.

As part of the program, customers were given the freedom to essentially “test” the open market by moving away from state-only contracts. The results were remarkable. Through a combination of group purchasing contracts from various consortia, the university saved $760,000 on computers, $8,000 on furniture, $26,000 on computer peripherals, and $217,000 on office supplies during the first full year of the pilot program. Swanson predicts that UK will save much more than that in the future. “The freedom allowed by the autonomy from state jurisdiction is critical to designing a procurement program that meets the strategic needs of the institution.”

**Invest in Your Institution’s People—They Are Your Most Powerful Resource**

While the beleaguered economy has certainly placed added pressure on today’s procurement professionals, most will tell you they’ve been feeling the pinch for quite some time. In addition to dwindling budgets, many departments have been forced to swallow the bitter pill of added responsibilities spread over fewer staff.

At California State Polytechnic University, San Luis Obispo, the hiring freeze has forced Procurement to reorganize and reallocate human resources. “As personnel move on or retire, which they always do in an organization of this size, they are not being replaced at the same rate they would be in a ‘normal’ budget climate,” said Matthew Roberts, Director of Contracts, Procurement and Risk Management at Cal Poly. “When this occurs, we have no choice but to redistribute their workload to remaining personnel or eliminate the task completely. While this is often perceived as a burden, it is also an opportunity to rethink and streamline how we do business.”

Clearly, the path toward elevating procurement’s role on campus is paved with many choices. And while the current economy provides some unforeseen challenges, it can also be the impetus for some extraordinary growth. The heart of any organization, however, is always its people.

“We can bring in all the new technology we want, and we can put an infinite amount of strategic contracts in place, but it isn’t going to mean anything if we don’t transition our people,” Cooper said. “We have to take a serious look at our workforce and ensure that they have the skills, the tools, and the shared vision to make our successes possible.”

Roberts agrees, “Being strategic is about figuring out what is important at your institution and making sure your department excels in those particular areas. If timeliness is important, then focus on process improvement and prioritization. If customer service is problematic, then focus on addressing employee behavior and attitudes. If cost is the key issue, then focus on the total cost of ownership and the competitive processes. And if improvement in all of these areas is important, then start with people. When we improve our staff’s abilities, the other important areas naturally improve with them.”
Some of you have already expressed an interest in attending NAEP’s CPSM (Certified Professional in Supply Management) Bridge Exam Preparation Workshop at the 2010 Annual Conference in Denver. Others of you want to study on your own—but with on-line assistance from NAEP—either for the three individual CPSM exams or the one Bridge Exam (for existing C.P.M.s only). Below, I have identified the options available from both NAEP and ISM.

**From NAEP**

For those of you attending the CPSM Bridge Exam Preparation Workshop at the 2010 Annual Conference in Denver, we will:

- Identify the study materials that MUST be purchased and read before the session;
- Provide a list of other study materials, i.e., “suggested outside readings” used by exam question-writers, that would be helpful for passing the test;
- Provide a cross-reference between the Tasks of the Study Guides and the Chapters of the *must have* textbooks;
- Tell how to obtain ISM’s sample exams, complete with explanations of why the correct answer is correct and the incorrect answers are wrong;
- Provide other sample exam questions and answers; and
- Provide feedback from previous test takers that shows what topics are on the exams.

To register, go to the NAEP website (www.naepnet.org) and link to the 2010 Annual Conference. Prior to the workshop, we will contact all registrants to prepare them for the actual workshop.

If you are studying on your own, the above information and handouts will be available along with online assistance. A registration form is being developed. Stay tuned.

**From ISM**

What other options are available to those of you pursuing certification as a CPSM (either via all three exams or just the single Bridge Exam)? Listed below is what ISM identifies on its website, www.ism.ws. Contact ISM directly for more particulars.

**CPSM® Exam 1 Online Review Course**

#3969 (10 CEHs)

The CPSM® Exam 1 Online Course is for candidates who are preparing for the CPSM® Exam 1. Participants get an in-depth review and assessment of the material in the CPSM® Study Guide by tailoring their course to their specific study needs. In this course, participants will gain an understanding of the CPSM® program and of the breadth of content covered in the CPSM® Exam. The course includes an electronic CPSM® Exam Specification exam outline, CPSM® Study Guide materials, sample test questions, case studies, and bonus supplemental content developed by subject-matter experts. **NOTE:** The cost of this course does NOT include the CPSM Study Guide nor related textbooks.

**CPSM® Exam 2 Online Review Course**

#3970 (10 CEHs)

The CPSM® Exam 2 Online Course is for candidates who are preparing for the CPSM® Exam 2. Participants get an in-depth review and assessment of the material in the CPSM® Study Guide by tailoring their course to their specific study needs. In this course, participants will gain an understanding of the CPSM® program and of the breadth of content covered in the CPSM® Exam. The course includes an electronic CPSM® Exam Specification exam outline, CPSM® Study Guide materials, sample test questions, case studies, and supplemental content developed by subject-matter experts. **NOTE:** The cost of this course does NOT include the CPSM Study Guide nor related textbooks.

---

Please be advised that at press time, CPSM bridge exam preparation workshop and exam will not be offered at the NAEP Annual Conference due to lack of pre-registration response.
CPSM® Exam 3 Online Review Course #3971 (12 CEHs)

The CPSM® Exam 3 Online Course is for candidates who are preparing for the CPSM® Exam 3. Participants get an in-depth review and assessment of the material in the CPSM® Study Guide by tailoring their course to their specific study needs. In this course, participants will gain an understanding of the CPSM® program and of the breadth of content covered in the CPSM® Exam.

The course includes an electronic CPSM® Exam Specification exam outline, CPSM® Study Guide materials, sample test questions, case studies and supplemental content developed by subject-matter experts. **NOTE:** The cost of this course does NOT include the CPSM Study Guide nor related textbooks.

CPSM® Bridge Online Review Course #3968 (21 CEHs)

This course is designed as a review for current C.P.M. holders as part of their preparation for taking the CPSM® Bridge Exam. It is intended to enable candidates to assess the knowledge they have acquired through education and experience against the content areas covered by the CPSM® Bridge Exam. It is not intended for those planning to take the full CPSM® Exam.

In this course, participants will gain an understanding of the CPSM® program and of the breadth of content covered in the CPSM® Exam. The course contains content for all tasks for the CPSM® Bridge Exam. Content for this course includes CPSM® Exam Specification exam outlines, CPSM® study guide materials in an electronic format, question format and types, and supplemental content developed by content experts. This supplemental content will provide candidates additional content for those tasks that may have more questions on the exam. **NOTE:** The cost of this course does NOT include the CPSM Study Guide nor related textbooks.

If you have questions or need clarification on any of the above, e-mail Bob Ashby, C.P.M., CPCM at ashbybob@embarqmail.com.

Bob Ashby, C.P.M., CPCM, is retired from his position as Director of Purchasing and Contracts for the University of Nevada, Las Vegas, where he also served as an Adjunct Professor in the Management Department. Bob has been active in NAEP since 1997. In 2006, he received NAEP’s Distinguished Service Award, and in 2008, he won the newly established Mentor of the Year Award. NAEP renamed the award in his honor to the Bob Ashby Mentor of the Year Award in 2009. E-mail: ashbybob@embarqmail.com.

William E. Haas Memorial Scholarship Fund allows Members the opportunity to obtain professional development that they may not have otherwise been able to receive. Since 1979, over 150 Members have received scholarships from this fund. Help us reach our goals so that by 2012 we can begin to award each region a $1,000 scholarship. Your tax-deductible contribution can be made as a one-time payment or on a monthly pledge basis by calling Shaunte’ Shelton, NAEP’s Membership Administrator, at 443.543.5541.

Sons & Daughters Scholarship Fund supports and encourages the higher education of dependents of NAEP Members. This opportunity for your children adds value to your participation and Membership and also recognizes professional service that is provided to NAEP and our Member Institutions. For more information on how your organization can contribute to the NAEP Sons & Daughters Scholarship Fund, or to establish a fund named for your organization, please contact Paul Ravenscroft, NAEP’s Director of Finance & Administration, at 443.543.5527.

Mentor of the Year Award: Is it only about Certification?

A colleague recently asked me if NAEP’s Bob Ashby Mentor of the Year Award could be won only by those who helped their peers obtain a professional certification. The person asking noted that the award, started in 2008, had been won only by those who encouraged co-workers to obtain professional certification and then coached, aided, and guided them toward that goal. Although the award came about because of my mentoring our highly successful C.P.M. “Musketeers,” I assured my colleague that the award is designed to honor anyone who has mentored one of our NAEP Members in any number of ways. I directed him to the award criteria outlined on NAEP’s website, which identifies eight examples of mentoring. I encourage NAEP Members to read these criteria and consider if you know someone who deserves this nomination. If so, you can access the nomination form online at www.naepnet.org. Questions? E-mail me at ashbybob@embarqmail.com.
Reaching New Heights: Gain Altitude with E-Procurement

by Julie Hepner

SciQuest

A transformation is underway. The reformation of procurement from a processing function into a powerful driver of bottom-line results is accelerating, visible not only in the new skills required of educational procurement professionals, but also in their changing roles within the institutions they serve.

What makes this transformation so important is its absolute necessity. Throughout higher education, funding sources are declining. At the same time, tuition increases—long viewed as a panacea for budget shortfalls—are already at levels that threaten to make higher education inaccessible.

In response, many institutions continue to make budget cuts—a short-term remedy for a cash flow challenge not likely to end soon. Leaders are painfully aware that such triage cannot continue indefinitely. Each cut is more difficult than the last.

As a result, the procurement community is being asked to transform itself, as purchasing emerges from relative obscurity to mission-criticality. Heeding this call for action, a cadre of procurement veterans is redefining not only how higher education approaches purchasing, but the very nature of the educational procurement profession.

Intent to raise their operations to new heights, these forward thinkers are keenly aware that as a processing function, procurement has little ability to manage spending rather than just process it,” notes John Riley, the President of NAEP and Executive Director of Purchasing and Business Services at Arizona State University. “For many years, our profession worked under the limitations of a very real and significant technology gap. There simply was no way to gain visibility over and analyze spending, or manage it to maximize buying power. That’s why e-procurement technology is so central to our profession today, and why in its absence, procurement languished for so long as a bureaucratic function.”

Riley stresses that procurement automation technology, particularly on-demand solutions that enable dispersed organizations to create a one-stopping environment, is crucial because it gives procurement leaders the tools and capabilities they need to realize their vision. “With the many procurement automation tools now available, there’s no reason for order processing to monopolize procurement’s time. Technology provides us with an opportunity and the bandwidth needed to instead apply the strategic sourcing acumen and negotiation expertise our predecessors rarely were allowed to exercise.”

Riley points to several trends as evidence of how the innovative application of technologies now available allows NAEP Members to take their procurement organizations to a higher level. These include the increasing number of smaller institutions that are becoming more strategic through the automation of procurement processes, the rise of consortium communities, procurement’s increasing role in sustainability efforts, and growing appreciation of the effective cost-containment achieved by purchasing departments. These trends reveal the essential elements required to take procurement to a higher altitude.
Implementing a strategic, entrepreneurial approach to procurement in higher education, Ralph Maier, (Chief Procurement Officer at the University of Pennsylvania) and the Purchasing Services Department recently completed a four-year effort to generate $50 million in documented savings through the application of strategic sourcing techniques—aptly named the Cost Containment Project.

Maier’s team reached the goal nearly a year ahead of schedule. The effort brought the total savings that purchasing services secured over the past decade to nearly $90 million—something Maier credits to strong support from the university’s senior leadership.

“Right now, you have a relatively small number of schools that have adopted the automation required to use some of the more strategic sourcing techniques that are available in the marketplace,” adds Maier. “At the same time, the economic downturn has demonstrated the absolute necessity of stretching the value of every dollar, prompting more and more senior leaders to support not only the acquisition of the required procurement technologies, but more importantly, their backing of the sourcing techniques these technologies make possible. Schools are definitely becoming more interested in figuring out how to automate the procurement process.”

**The Ultimate Cost Containment Strategy**

E-procurement has emerged as the foundation on which consortium communities can be built and executed. At the Inter-University Council of Ohio, Bowling Green State University, Miami University, Ohio University, and Shawnee State University recently announced they will share a common e-procurement platform to realize their combined buying power. Kent State, Wright State and Youngstown State Universities will further augment this consortium community, enabling members to negotiate more competitive prices with suppliers and share resources.

“Our primary goal is to save money, but we’ll also be able to share resources,” said Brad Leigh, Executive Director of business operations for Bowling Green State University. “For example, if a counterpart at another university negotiates exceptional rates for a commodity group, as a buying consortium we can focus on opportunities to negotiate better terms in additional areas.

**Strength in Numbers**

As university systems seek to lower costs, e-procurement has emerged as the foundation on which consortium communities can be built and executed. At the Inter-University Council of Ohio, Bowling Green State University, Miami University, Ohio University, and Shawnee State University recently announced they will share a common e-procurement platform to realize their combined buying power. Kent State, Wright State and Youngstown State Universities will further augment this consortium community, enabling members to negotiate more competitive prices with suppliers and share resources.

“Our primary goal is to save money, but we’ll also be able to share resources,” said Brad Leigh, Executive Director of business operations for Bowling Green State University. “For example, if a counterpart at another university negotiates exceptional rates for a commodity group, as a buying consortium we can focus on opportunities to negotiate better terms in additional areas.

**From Ideals to Fiscal Policies**

E-procurement has also emerged as a powerful way to further the pursuit of mission-oriented goals, from environmental stewardship to local economic development. At the University of Michigan, delivery processes implemented by the procurement team led by Bonny Webber, Operations Manager of Strategic Contract Management, quickly eliminated more than $140,000 in fuel and delivery surcharges, negated the use of nearly eight tons of cardboard, 26 tons of CO2 emissions, and more than 2,000 gallons of fuel.

“When users can make their purchases in one system, you gain the critical mass needed not only to negotiate for cost, but other factors like sustainability,” says Webber. “We can use our spending to support goals that higher education historically advocated, but had little ability to influence. Procurement is the one department that has the ability to transform ideals into real fiscal policies that, in the end, make a real difference.”

These examples represent just a few of the ways that innovative leaders in higher education are beginning to use e-procurement technology to the benefit of their institutions. For Riley, what we are seeing now offers a small glimpse of what’s to come.

“It’s difficult to comprehend the magnitude of the opportunity we have to shape higher education. Our skills are needed more than ever and we have the technologies required to exercise them. There’s never been a more exciting time to be procurement professional in higher education. We’re just now taking off on a flight that will take our profession to new heights.”

---

**Save the Date**

NAEP Diversity Conference
August 1–4, 2010
Hilton Providence, Rhode Island

For more information, visit www.naepnet.org or contact jhepner@naepnet.org.
About two years ago, the selection of construction management firms, general contractors and architectural firms was transferred from Miami Dade College’s Facilities Management Department to the college’s Purchasing Department. This was a challenging task considering that purchasing had never before managed this process. Nevertheless, we were excited about the new challenge.

To this point, the process to receive and distribute RFQ packages to committee members had been manual. RFQ packages were received, sorted, boxed, and shipped to committee members across our campuses. Those of you who have done this before can understand how labor-intensive and frustrating this can be, especially when, in some cases, we were receiving 25 to 30 responses. Multiply that by five or six committee members and you have 150 six-inch, 10-pound binders lying around your office needing to get somewhere fast. In addition, when we held evaluation meetings, committee members complained about having to carry around the heavy loads.

The questions urgently became: “How could we simplify the process? How could we get rid of the binders, improve service to the committees, and save time and labor?” The solution presented itself when, in an unrelated meeting, one of our IT techs showed up with his laptop containing digital versions of the documents needed for the discussion. Everyone liked the idea.

That got me thinking: RFQ packages in digital format! At first, we played with the idea of scanning RFQ packages and then burning them onto CDs. However, this still required labor, and we did it only once, which was enough. Then the light came on again: Let’s get respondents to submit scanned copies of their original binder on a CD, which we did in the next selection process. For distribution to the committee, we used CDs and flash drives.

More recently, we have begun to use the college’s SharePoint software. The RFQs are uploaded to the program, which allows us to share the files through the Internet. Access to the site is granted to committee members, and they can review the proposals any time. This has proven to be a great tool and one that did not cost our department a single penny, since the license is held by the college. In addition to RFQ packages, we also load the site-evaluation sheets, committee rules, evaluation guidelines, and anything needed by the committee. Still, in spite of the advantages, some members prefer the binders. For them, we make the original binders available in our departmental office—or they can choose to print the sections they want.

At the moment, we are considering allowing respondents to upload their documents directly to our website and then require originals only on key documents like cover sheets, non-discrimination forms, public entity crime affidavits, and the like.

This method of response distribution has greatly expedited delivery to committee members and has enabled document accessibility.

If you are “new to the game,” here are some pointers to keep in mind:

- Ask respondents not to format images as high resolution PDF files because they require an inordinate amount of memory;
- Ask that PDF files have thumbnails for each section. This allows clicking to the desired section—faster and easier than scrolling through the document;
- Establishing page limits per section. This will keep responses reasonable in size.

Ramon S. Bristol Castrillon, CPPO, is Assistant Purchasing Director, Facilities/Plan Maintenance, at Miami Dade College. He has more than 15 years of experience in government procurement and worked with the Federal government (U.S. Coast Guard), the State of Florida and the college (for 10 years). He is responsible for all plant maintenance and facilities procurements, including selection of architects and contractors for all remodeling, renovation and new construction projects. Ramon is a member of NIGP and has a B.S. in business administration and a masters degree in management. E-mail: rbristol@mdc.edu.
Rescue your budget.

Save money now.

Buy supplies, furniture, technology, science supplies and equipment, synthetic turf and other athletic surfaces. And much, much more.

Visit www.uscommunities.org and sign up today.

It’s free, easy and there’s no commitment. Just savings.
U.S. Communities Delivers:

- Over 20 Years Experience
- Best in Class Customer Service
- No User Fees
- Best Supplier Pricing
- Convenience and Efficiency
- Sponsored by 5 National Organizations and Over 70 State Organizations
- Oversight by Public Purchasing Professionals

Save today on what you need

Top Quality Suppliers:

- Office & School Supplies
- Office Depot

- Maintenance, Repair & Operating Supplies
- Thomas

- Technology Products & Equipment
- Insight

- Technology Services & Solutions
- CTSI

- Print Solutions
- Office Depot

- Electrical & Data Communications
- Graybar

- Office Machines
- Ricoh, Lanier, Savin

- Office Furniture
- Haworth, Herman Miller, Knoll

- Janitorial Supplies
- Zip's

- Education Furniture
- Vello

- Park & Playground
- GameTime, Life Fitness, US Games

- Athletic Equipment & P.E. Supplies
- Hagemeyer

- Homeland Security & Public Safety Solutions
- Tenzing

- Paint Solutions
- Behr

- Auto Parts & Accessories
- AutoZone

- Synthetic Turf & Other Athletic Surfaces
- AstroTurf

- Science/Labware Supplies & Equipment
- Fisher Science Education

- Elevator Maintenance & Service
- KONE

- Equipment & Tool Rental Services
- Hertz

- Roofing Supplies, Related Products & Services
- DBS

- Uniform & Work Apparel
- ServiceWear apparel

THE HOME DEPOT and the Home Depot logo are trademarks of Home Depot LLC., used under license.
As a purchasing card program administrator, this thought crosses my mind several times a day. She bought what with the p-card? Didn’t he know that splitting transactions is a violation of policy? What were they thinking?

For many cardholders, the list of dos and don’ts of the p-card program can be daunting. We in the Purchasing Department know that our p-card guidelines are designed to protect the university, as well as the cardholder. University policies, grant and other funding restrictions, and competitive process requirements are all factors in determining which commodities may be purchased with a p-card. But how do you educate and inform cardholders on these policies, especially as your p-card program matures and cardholders have been using their cards for years?

A certification program may provide an opportunity for you to communicate p-card guidelines in addition to your cardholder training program, websites, and e-mail communications. Let’s look at the reasons to certify cardholders, things to consider in developing a certification program, and situations where this program may be used.

The Case for Certification

To review the guidelines of your program. Most p-card programs require some kind of training for cardholders. This may be done in a classroom setting, through online documents, presentations, webcasts, or over the phone. But when research suggests that people retain about 30 percent of what is presented to them in a learning situation, should we be surprised when cardholders stray from our guidelines? And what about the cardholders who have had their cards for three years, five years, or even more than a decade? Certification provides a means of presenting this information to cardholders on a periodic basis.

Because your p-card program guidelines have changed. As university and procurement policies change, so do the guidelines of your p-card program, and despite your best efforts to communicate these changes, the information you consider critical to your program may be perceived as more “noise” by a cardholder overwhelmed with e-mails and memos. Certification gives you the opportunity to review any recent program changes with your cardholders.

Because the cardholder has had a change in responsibilities or position. As purchasing professionals, we are aware of the scope of procurement at our institutions. Our individual cardholders may deal with only a fraction of the types of procurement we address in our p-card guidelines. For example, cardholders in our History Department have never needed to purchase any radioactive materials. So when a position or job responsibilities change, a cardholder may be asked to buy new commodities. Certification may serve as a refresher course on p-card guidelines for those commodities.

As a means to document delivery of information on policies and procedures. As your p-card program changes over time, it may be difficult to document that a cardholder has received information about those changes. Your cardholder agreement may include language about complying with any additional restrictions communicated to the cardholder after the date of the application. Implementing a certification program allows you to document this communication process.

Are Your Cardholders Certifiable?

by Lesley Lackore, CPCP
Iowa State University
Things to Consider in Developing Your Certification Program

How will the certification be delivered? Online delivery is convenient for many cardholders, allowing them to review information at their desk. But do all of your cardholders have online access? Is an online offering the best learning environment for all of your cardholders? Consider offering a face-to-face training option in conjunction with an online certification program.

What resources are needed for implementation and follow up? How will you notify cardholders about completing certification, monitor the progress of cardholders in the process, answer questions, and follow up when needed? Using your university's online course software provides a tool for learning and assessment that may already be used by your cardholders and available to your department at little or no cost. Many of these software programs (such as Blackboard and WebCT) include very sophisticated features, but will take time for your p-card team to learn and maintain.

Will your certification process include a graded test? If you use an online test, how will users be authenticated when they access your system? What score must your cardholders achieve to pass the test? Will cardholders have the opportunity to take the test more than once?

What are the consequences if the cardholder does not complete the certification process? Cardholders may fail to complete the certification process by a given deadline, or fail the test. How will you handle these situations? Will cards be suspended?

How will you handle certification for cardholders who may have different card configurations, or exceptions to your policies? Will you need to develop different versions of your certification for groups of cardholders with different rights and restrictions? If you have allowed certain cardholders exceptions to your p-card guidelines, how will you address these exceptions in the certification process?

Situations Where Certification May Be Used

At the time the card is issued. Your certification process could be used for initial cardholder training. Consider how your cardholders receive information about your program. Would the certification process complement your classroom training, or could it be used in place of it, especially when face-to-face training is not practical?

At the time the card is renewed. Your p-card program's renewal cycle (typically two or three years) is a logical time for cardholders to be reminded about appropriate use of the card. You might consider beginning the certification process a few months before the card's renewal date, giving the cardholders time to complete certification before your bank runs the renewal process. This would allow you to suspend card renewals for any cardholder who had not been certified.

In cases of misuse. When a cardholder has violated program guidelines, retraining may be required as a part of the appeal process for card privileges to be reinstated. Certification can provide proof that the cardholder completed a retraining on program policies and proper use of the p-card.

In training users of your reconciliation system. If your p-card system allows for proxy reconciliation of p-card transactions, you may have system users (who may or may not be cardholders) who are working with p-card transactions for a number of cardholders in a department. These users often become the "local experts" about the p-card program, and cardholders may turn to them for guidance in using their cards. Certifying these users can benefit your program by presenting the same information to them as to the cardholders.

Most cardholders want to retain the convenience of the p-card by living by your rules. Enforcing your p-card policies can be a challenge, but implementing a certification program may give you one more opportunity to keep your cardholders on the straight and narrow path of compliance.

Lesley Lackore, CPCP, is a Program Coordinator in the Purchasing Department at Iowa State University. She is responsible for purchasing card program administration and systems administration and training. She was among the first purchasing card administrators in the nation to earn the Certified Purchasing Card Professional designation. Lesley has presented at the national P-Cards on Campus Conference and the Annual Conference of the National Association of Purchasing Card Professionals. E-mail: LLackore@iastate.edu.
had the privilege of attending the ACUPCC Leadership Summit in Chicago during the second week of August 2009. It was an incredible two-day program that was challenging and thought provoking. The focus of the Leadership Summit was climate change and reaching carbon neutrality, a significant component of sustainability. Of the 240 attendees, about 140 were from higher education and included 40 college or university presidents. The balance of the attendees were from the corporate, nonprofit, or government sectors.

Six hundred and fifty presidents have now signed the commitment. While that is only 10 percent of the 6,000-plus institutions that could participate, the signers represent about 55 percent of the total number of students in our colleges and universities. When you combine this level of commitment with the dozens of cities that have made a similar commitment to carbon neutrality, it is clear that this is not a phase we are passing through, but a permanent and fundamental change in the way we live and work.

What follows are highlights and observations from the Leadership Summit and some thoughts on the implications for us, personally and professionally.

**Key Speakers**

Anthony Cortese, President, Second Nature, is a friend of NAEP, and his organization provides most of the logistical and operational support for the ACUPCC. Tony is also the co-organizer of the ACUPCC and co-founder of AASHE and HEASC. Tony opened the Summit and provided context for the ground we were about to cover over the next couple of days. I want to include him in my listing of key speakers because of his role in establishing these significant organizations.

Martha J. Kanter, Undersecretary of Education, U.S. Department of Education, provided the keynote address. Significant in her remarks were the expressed commitment from the administration for increasing support for the advancement of education and research for climate studies, and a new and formal level of collaboration between major administrative departments in support of climate change.

Joseph Grasso, Assistant Dean for Finance and Administration, Cornell University, is the Chair of the NACUBO Sustainability Advisory Panel. He addressed a couple of important issues. First, the cost of moving toward carbon neutrality is not as daunting as we might think. For Cornell, the cost is projected to be $5 million to $10 million annually over 30 years. The present value is just over $150 million. This isn’t pocket change but, in the context of Cornell’s overall operating budget, it is manageable. His second point addressed the implications of the energy legislation currently being considered by the Congress, commonly referred to as Cap and Trade. If this legislation passes, everything changes. Significant to our institutions is that the cost of not doing anything to address carbon neutrality may become very high.

Michael Kinsley, Senior Consultant, Rocky Mountain Institute, addressed practical strategies for reducing greenhouse gas (GHG) emissions. He provided several examples of new facilities that do not emit GHG and do not require any off-site power to operate. In other words, this can be done with existing technology. He addressed the obvious question of cost/benefit.
In the examples he shared, sustainable building systems must be considered an investment, not a cost. Taken in the aggregate, an ROI of 15 to 20 percent is not unusual. It is important that we reframe the discussion from one of initial cost, to total cost of ownership. It’s the only approach that makes sense.

Peter M. Senge, Senior Lecturer, Massachusetts Institute of Technology, and Founding Chair, Society for Organizational Learning, was a treat to hear. Senge was named as one of the 24 people who had the greatest influence on business strategy over the last 100 years by the Journal of Business Strategy and as one of the top 10 management gurus by Business Week. He conducted three sessions at the Summit that addressed leading profound change initiatives and creating climate-literate graduates. Professor Senge helped us to understand the tension that is created when there is a significant gap between the vision for an organization and the current reality. We have options for dealing with the tension. We can lower our vision. That is compromise. We can kid ourselves regarding the current reality. We call that denial. A third option is to work on tangible steps to narrow the gap. All will reduce tension. One will result in progress. One key to creating change that is sustainable—involve a lot of people in developing the strategy.

Michael Crow, President, Arizona State University, is chair of the ACUPCC Steering Committee and one of the initial signatories of the Presidents’ Climate Commitment. His comments to the Summit attendees were brief, but pointed. He challenged his fellow presidents to sign the commitment. Crow posed the following challenge, “…500 years from now, when historians look back at this time and the actions taken to minimize the negative impact of climate change, they will want to know, ‘Who stepped up? Will we be numbered among them?’” Regarding the importance of engagement by higher education, “We may have only three percent of the carbon footprint, but we have 100% of the students. We can make an impact.”

President Bill Clinton, Founder of the William J. Clinton Foundation and the 42nd President of the United States, was a surprise. I was under the impression that President Clinton would address the Summit by video broadcast. I was wrong. He was there in person to address a pretty small group of educational leaders. The Clinton Climate Initiative is a program component of the larger work of the Clinton Foundation, but definitely an important one for the former president. He focused on some important and practical questions regarding the reduction of GHG: How do we do this? How do we pay for it? He stressed the importance of decoupling project financing so that savings realized through operating efficiencies are then shared with the consumer. That can address motivational issues. The second is to string out financing for these projects for as long a period as possible. The President also cited the impact that investment can have on jobs. An investment of $1 billion will create 875 jobs in the coal industry; 1,800 in the solar industry; 3,000 in wind energy production; or 6,000 in building retrofits for energy efficiency. He suggested that this is the most logical and practical way for the United States to prosper in the emerging climate related economy.

Janine Benyus, Biologist, Innovation Consultant, and Author of Biomimicry: Innovation Inspired by Nature and five other books, described in Biomimicry an emerging discipline that seeks sustainable solutions by emulating nature’s designs and processes. She provided us with many examples. I’ll share one. Termite mounds maintain a constant temperature of about 76 degrees Fahrenheit, regardless of the outside temperature. This occurs because of a series of vertical passages for air handling incorporated into the design of the mound. The Eastgate Centre in Zimbabwe has emulated this design with the result being a structure that does not require an HVAC system for cooling. You can find this and other fascinating observations at www.asknature.org.

Jose Zaglul, President, EARTH University (Costa Rica), provided us with an international perspective on the role of higher education in climate and sustainability efforts, including a couple of noteworthy items. All EARTH University students must form a business. They can do so in groups of three to five, and each company must develop a product or service that has a positive environmental impact, a healthy economic component, and a positive social impact. It takes about 200 credit hours to earn a degree and more than 20 percent of their graduates own and operate their own businesses. The nation of Costa Rica has committed to be carbon neutral by 2021, and they are concerned that they will not be first. Denmark is committed to a date of 2019.

Some Observations

The subjects of climate change and carbon neutrality have not been without controversy. While there is reasonably solid consensus that global warming is a current reality, there are differences of opinion regarding the degree to which human behavior is responsible for the condition. There is also a sizable portion of the population that considers the issue of carbon neutrality and the broader context of sustainability to be political or economic fabrications of environmentalists seeking to control or limit growth and development to coincide with their view of the world. The reason that people hold that perspective is that there is some truth to it. Nevertheless, it isn’t the whole truth and is somewhat irrelevant. We have reached a tipping point in our response to climate change.

We are in the early phases of a major economic shift. We can point to others. The industrial revolution of the late nineteenth century changed the world. Our economic strength shifted from agriculture to industry; the population began a permanent shift from rural to urban communities; labor unions were formed; labor laws were changed; and wealth shifted. Not everyone liked it or agreed with it, but shift happened.

Another big shift came with the explosion of information technology; the age of the computer and the amazing changes that took place as computational power became cheaper and more pervasive. Entire industries were phased out as computational power became cheaper and more pervasive. Entire industries were phased out as the information economy grew. This change was pervasive and also permanent.

The international response to climate change represents the conception of a new economy. As we identify opportunities to build more environmentally compatible and more livable structures,
reduce our dependence on fossil fuels and reduce the drain on our natural resources, we will see a rise in new technology along with the formation of new companies and new jobs. As with the previous fundamental shifts in the economy, the early stages may be a bit lumbering, but efficiencies will come exponentially. We will not be moving backwards. The only unknown is the slope of the curve. When we have the benefit of hindsight, we will know if the higher education community in the United States engaged sufficiently to prepare our students for the new economy and where the providers of new technology and services are located. Hopefully, many will have U.S. zip codes. This train has left the station. Regardless of your position on global warming or the politics of environmentalism, there are lots of reasons to climb on.

- 68 percent of college applicants are looking for a “green campus.” Consider this as customer responsiveness.
- Why would anyone be opposed to cleaner air and water, a healthier working environment, less dependence on foreign oil and fossil fuels in general, smaller landfills, and healthier food?
- This change is permanent. Failure to engage is not an option.
- Our success as professionals in higher education requires that we are aligned with the needs and direction of our society.

A Final Thought

As I listened to President Clinton address the Summit, my field of vision also took in the backs of some heads, and I couldn’t help but think of our friend Brian. Sitting in front of me were several of his friends and inspirational heroes. Brian Yeoman and Tony Cortese have been joined at the hip for years as leaders in the sustainability movement in higher education. Brian has referenced Peter Senge many times in our conversations as someone who has influenced his thinking. The executive director of ASU’s Decision Theater, George Basile, attended the Summit and is counted among his close friends. Brian now works for the Clinton Climate Initiative. In terms of NAEP’s connection to sustainability, Brian was our visionary. He was later joined by others, most notably Kevin Lyons (Rutgers) and Doreen Murner (CEO, NAEP). We owe them our thanks for their leadership.
Environmental Literacy

by Brian K. Yeoman

We have entered a time when more and more institutions are adopting green purchasing policies, signing the American College and University Presidents’ Climate Commitment (ACUPCC) pledge, and becoming members of the Association for the Advancement of Sustainability in Higher Education (AASHE). It would seem appropriate and right to provide more information on greening for our individual and collective benefit.

Thinking that this could be a fun approach, here is the tried-and-true multiple choice and true/false testing methodology.

Here we go!

1. What date is Earth Day?
   A. January 20
   B. April 1
   C. April 22

2. Climate Change is: (select all that are true)
   A. Causing ice to melt at the North and South Poles
   B. Causing more stormy weather all over the globe
   C. Caused by heat trapping greenhouse gases such as methane
   D. All of the above

3. Where are greenhouse gases?
   A. In the atmosphere
   B. In the mountains
   C. In outer space
   D. In soil

4. Plastics are found naturally on the planet. True or False?

5. Instead of burning fossil fuels we can make electricity from…
   A. The sun
   B. The wind
   C. The tides
   D. All of the above

6. What are greenhouse gases?
   A. Gases that trap heat in the atmosphere
   B. Gases made by plants growing in greenhouses
   C. Gases used to heat greenhouses so they can grow
   D. All of the above

7. All plastic products are made from…
   A. Trees
   B. Bones
   C. Fossil fuels
   D. None of the above

8. Coal is made from…
   A. Hot Lava
   B. Chemicals mixed together under extreme pressure
   C. Ancient dead plants and animals
   D. None of the above

9. When we recycle one ton of paper we save…
   A. 7,000 gallons of water
   B. 60 pounds of criteria air pollutants
   C. Seventeen mature trees
   D. All of the above

10. Almost all of the energy we use on the planet came from where?
    A. The sun
    B. The oceans
    C. The soil
    D. The air

11. How many planet “Earths” would we need if every person on the planet had a footprint like the average American?
    A. 3.9
    B. 5.8
    C. 7.6
    D. 10.0

12. Which of the following is NOT a greenhouse gas?
    A. Methane
    B. Nitrous Oxide
    C. Oxygen
    D. Carbon Dioxide
13. There are twice as many people on the planet today as there were 50 years ago. True or False?

14. How many times can a piece of paper be recycled?
   A. Twice
   B. Four times
   C. Seven times
   D. Ten times

15. The popular mantra is “reduce, reuse and recycle.” Which is the least important of these?
   A. Reduce
   B. Reuse
   C. Recycle
   D. None of the above; they are all equally important

16. Recycling one aluminum can saves enough energy to run a television for how long?
   A. 3 hours
   B. 5 hours
   C. 6 hours
   D. 8 hours

17. A 10-gram gold ring required how many pounds of ore to be processed to yield the gold?
   A. 500
   B. 1600
   C. 2500
   D. 6000
   E. 8000

18. How many gallons of water does it take to make a hamburger?
   A. none
   B. 59
   C. 314
   D. 565
   E. 703

19. A typical computer chip requires how many gallons of water to be manufactured?
   A. none
   B. 250
   C. 500
   D. 1000
   E. 2800

20. An Indonesian shoe-factory worker making all of the major brand name shoes you pay $90 for is paid how much per hour?
   A. $0.25
   B. $1.40
   C. $5.65
   D. $7.50

These questions are intended to assist each of us in building our general level of knowledge. As we engage in the process, we will be working to create a learning organization. We will do this at a pace that doesn’t push anyone and, hopefully, we can have some fun along the way. There is a certain danger in this. First, I could offend you. Second, I could embarrass myself. Or third, I could waste much of your time. Regardless, I decided to pursue this because it is my job to demonstrate sustainability leadership for NAEP. So I hope you enjoyed it.

If you have questions or comments to share, please send them to me. Remember that we all start a journey with but a single step. No matter where we are today, it will take time to reach our destination. So please be patient and rejoice in knowing that you too can do great things!

E&I Travel Solutions Program

• Low Fare Promise
• Fare Shopping
• Online Booking Tool
• 24/7 Assistance
• Emergency Travel Assistance
• Emergency Medical Assistance

• Concierge Services
• Athletic, Student Abroad & Groups
• Fly America Act Certified
• Specializes in Collegiate Travel

• Introducing a new medical and security assistance solution from Travel Guard.

Visit us at NAEP’s Annual Conference, Booth #939

Contact Marathon Travel to learn more about the E&I Travel Management contract.
866.482.7391 • www.e-itravel.com

Brian K. Yeoman is Director of Sustainable Leadership at NAEP and is the retired Associate Vice President for Facilities Planning and Campus Development at the University of Texas Health Science Center at Houston. E-mail: byeoman@naepnet.org.
AUDIO/VISUAL TECHNOLOGY

B&H Photo, Video, Pro Audio
420 9th Avenue
New York, NY 10001
Tel: (800) 947-8003
Fax: (800) 743-0895
Email: bid.dep@bhphotovideo.com
Website: www.bhphotovideo.com

B&H is a world-renowned as “the Professional’s Source” for all of your photo, video, pro-audio needs. We provide you with the best possible support-before, during, and after your purchase. Our success is built on the foundation of our over thirty-year commitment to honesty, integrity, and service to our valued clients.

BUILDING MAINTENANCE

MSC Industrial Supply, Co.
75 Maxxes Road
Melville, NY 11747
Tel: (800) 645-7270
Fax: (516) 812-1783
Email: Konikr@mscdirect.com
Website: www.mscdirect.com

MSC Industrial Supply carries a wide range of products for maintenance, repair, and operations, including HVAC systems, energy management solutions, and industrial lubricants. Their team provides technical support and training to ensure your facility runs smoothly.

COMPUTER FURNITURE

Virco® Furniture and Equipment: Virco's industry-leading product selection for learning environments includes: technology-ready TEXT™ tables; ergonomically contoured ZUMA®, Sage™, Metaphor® and Telos® classroom seating; and Parameter™ desks and workstations for teachers, principals and administrators. Hundreds of Virco items are GREENGUARD® certified. For large-scale furniture purchases, Virco's complimentary, hassle-free PlanSCAPE® service delivers on-time, on-budget solutions.

FLOOR COVERING

InterfaceFLOR
1503 Orchard Hill Road
LaGrange, GA 30240
Tel: (800) 536-0225 x 6511
Fax: (715) 334-2192
Email: tmower@marathontravel.com
Website: www.interfaceflor.com

InterfaceFLOR is the world's largest manufacturer of modular carpet. Recognized globally for its commitment to build environmental considerations into its business decisions, InterfaceFLOR is well along its stated path to Mission Zero, the company's promise to eliminate any negative impact it has on the environment by the year 2020.

FURNITURE

American Seating
401 American Seating Center
Grand Rapids, MI 49504-4499
Tel: (616) 732-6600
Fax: (616) 732-6847
Email: kelly.bagnall@amseco.com
Website: www.americanseating.com

American Seating is a leading manufacturer of educational furniture, including chairs, tables, and desks. They are committed to providing long-lasting solutions that meet the needs of today's classrooms.

Haworth, Inc.
312 Merchandise Mart
Chicago, IL 60654
Tel: (312) 644-3983
Fax: (312) 644-3983
Contact: Steven Knippen
Email: steven.knippen@haworth.com
Website: www.haworth.com

Haworth is a leading provider of furniture and workspace solutions for education environments. They are known for their commitment to sustainability and innovative designs.

HVAC

Big Ass Fans
2425 Merchant Street
Lexington, KY 40511
Tel: (877) BIG-FANS (877-244-3267)
Fax: (859) 233-0139
Email: info@bigassfans.com
Website: www.bigassfans.com

Big Ass Fans' 8 to 20-ft. commercial-grade product line is keeping energy costs low and student comfort high in cafeterias, libraries, auditoriums, athletic facilities, and large classrooms. They have been able to drastically reduce heating costs in the winter and improve student and athlete comfort in the summer.

MATTRESSES

University Sleep Products, Inc.
1520 Bayswater Lane
Cicero, IN 46034
Tel: (800) 548-2072
Fax: (517) 984-4813
Email: david@universitysleep.com
Website: www.universitysleep.com

University Sleep Products’ inverted seam mattresses and retrofit covers are easily cleanable, durable, fluid resistant, anti-bacterial, comfortable, bed bug resistant, come with warranties up to 5 years and pass all the full-scale institutional fire tests. They provide full service installation and recycling of your old mattresses to minimize your logistic requirements. All E&I members can purchase directly off of our national E&I Master Agreement CNR01223.

PURCHASING COOPERATIVES

E&I Cooperative Purchasing
Two Jericho Plaza, Suite 309
Jericho, NY 11753-1674
Tel: (800) 283-2634
Fax: (611) 630-8471
Email: suechel@eandi.org
Website: www.eandi.org

E&I Cooperative Purchasing is the purchasing arm of the National Joint Powers Alliance and Premier Purchasing Partners, providing educational institutions with the buying power of more than $31 billion in total purchasing power. They offer cost-effective solutions for a variety of needs, including furniture, equipment, and services.

SECURITY

BG Precision Products
600 North River Street
Derby KS 67507
Tel: (316) 788-200
Fax: (316) 788-7080
Email: sales@bgrproducts.com
Website: www.BGwireless.com

BRG’s Emergency Mass Notification System allows you to send alpha/numeric messages, Text-to-speech messages and live audio to your entire campus in less than 60 seconds. Our system also works with emergency dialing software like Rave. Our security solutions can also integrate into fire panel systems that feature speakers.

TRAVEL PROVIDER

Marathon Travel
3300 Business Park Drive
Seymour Point, WI 54488
Tel: (715) 344-7620
Fax: (715) 344-2197
Email: tmower@marathontravel.com
Website: www.e-travel.com

Marathon Travel is a full-service travel provider, offering travel planning services, policy and procedure development, and travel management systems. They are committed to delivering outstanding customer service and value to their clients.
As winter lingers and unusually cold temperatures plague even Florida and Texas, many of us in the northern latitudes gratefully acknowledge the time of year when pesky things wane and wither. Wasps. Yard work. Holiday visits from relatives—the kind who drop in to stay a while as you show them the local sights. One of our colleagues from southern California says he has taken houseguests to Disneyland so often that Mickey and Goofy call him Walt.

In professional procurement, there are three things from which we seem unable to escape:

Orders that linger
You know the drill. You take pity on a colleague facing a deadline and you agree to handle a few orders outside your normal responsibilities. Simple; right? A sixth sense drones your entanglement, whisper-like, in a recurring nightmare. You do what you always do, even taking the precaution to throw salt over your shoulder and spin in your chair three times while reciting the NAEP Code of Ethics. But, predictably, one of those orders arrives late, then damaged, and two years later you are still trying to get it off your expediting report. You can’t get rid of it, so you may as well keep the information close by. Solution? Create a file folder labeled: “Vampires: Refuse to Die.”

Inadequate or embarrassing specifications
At BYU, the purchase request simply stated, “1 each, Air Supply.” The buyer called our contract welding equipment supplier to see if it had fielded such a request. No. The requisition was actually trying to book “Air Supply” (the Australian rock band) for a campus performance.

At the University of Nebraska Veterinary School, a purchasing agent received a request for “one sick cow.” “They wanted an animal they could diagnose,” he lamented. “Do you know how embarrassing it is to ask, ‘Do you have any cows for sale? Are any of them sick?’”

Paper
The mantra of the 70s, “We’ll be a paperless society by 1980,” was so well believed that several paper mills went out of business during that decade, unable to raise capital in an effort to comply with EPA pollution regulations. Ray Larsen from Utah State University told a regional conference not to worry about becoming a paperless society until we saw paperless bathrooms. He was correct. In 2002, All Associates Group reported that the 29 million employees in the Fortune 1000 companies used nearly 10,000 sheets of paper per employee per year, with annual usage predicted to grow 10 percent through 2020.

I know my own desk is out of control when, during a phone call, I resort to frantically slapping the piles of paper to find a pen! I now maintain three file folders labeled “Future Landfill,” “Wasted Paper,” and “Dead Trees.”

I would love to hear your comments via e-mail or in person in Denver at the Annual Meeting. Meanwhile, perhaps I’ll go see a vampire movie for inspiration. Because, after all, and after, lo, these many years, procurement vampires still suck and are still a pain in the neck.

Craig Passey, C.P.M., has enjoyed a 30-year career in purchasing and travel for Brigham Young University, Provo, Utah, and for the LDS Church in Salt Lake City. His writing and teaching include assignments in both international and domestic procurement. He has a BS in financial planning and counseling, with a minor in international relations from BYU. E-mail: craig_passey@byu.edu.
American Seating .................................................. www.americanseating.com .................. 25, 27
B&H Photo, Video, Pro Audio .................................. www.bhphotovideo.com .................. 25
Big Ass Fans .......................................................... www.bigassfans.com .................. 25
BRG Precision Products ........................................ www.BRGwireless.com .................. 25
E & I Cooperative Purchasing ................................ www.eandi.org .................. 25, IFC
Haworth, Inc. ...................................................... www.haworth.com .................. 25
InterfaceFLOR .................................................... www.interfaceFLOR.com .................. 25
Marathon Travel .................................................. www.eitravel.com .................. 24, 25
MSC Industrial Supply Co. ................................... www.mscdirect.com .................. 25, OBC
Petoski Plastics .................................................. www.GreencoreBags.com .................. 22
Premier Purchasing Partners ................................ www.premierinc.com .................. 25
University Sleep Products, Inc. ....................... www.universitysleep.com .................. 25
U.S. Communities ............................................. www.uscommunities.org .................. 16, 17
Virco, Inc. ................................................................. www.virco.com .................. 25, Opp. IFC

American Seating Has Cool Tools For Schools.
As a leader in innovation, American Seating's new tools help customers create and specify education environments.

Focus™ Configurator
The Focus Configurator, allows users to design a custom Focus fixed lecture solution. Choose from a variety of options, fabrics and finishes to make your ideas come alive.
americanseating.com/focusconfigurator

Spec Builder
The Spec Builder, a cutting edge interactive tool, allows users to generate a complete and accurate specification for the Stellar® and Majestic® product lines in a quick and easy online format.
americanseating.com/specbuilder

American Seating is committed to lessening our impact on the planet through responsible stewardship of our environment.
it all adds up...

over 500,000 maintenance, repair and metalworking items

next day delivery

innovative procurement solutions

safe, clean and green campus solutions

MSC Industrial Supply
your total solution provider

Visit mscdirect.com/education.htm to view our campus solutions guide and current GSA, State & Education contracts.
For more information call 800.645.7270

*See mscdirect.com for complete terms and conditions