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Here’s a sampling of our nearly 200 national cooperative contract solutions:
Letter from the CEO

8 Spend Time This Summer Sorting Through Your Suppliers
Doreen Murner, CEO, NAEP
Summer is not as quiet as it is used to be. Use these next few months to refine ROI and the value your department brings to the table. One place to look? Your supplier relationships.

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10 The Power of Professional Relationships
Kelly Kozisek, CPPO, CPPB
Some of us learn quickly. Some of us, it may take years. But, it’s all about the relationships, and there is no better way to live that than by maximizing one’s Membership in NAEP. Serving, getting involved, getting involved are wonderful avenues to personal success and fulfillment.

12 NAEP Annual Meeting Celebrates Our National Award Winners
At our May 2016 Annual Meeting in San Antonio, with more than 425 attendees and 106 suppliers in attendance, NAEP announced these National Award Winners for their achievements during 2015.

14 Succession Planning
Kevin R. Gibbs
Whether or not money attracts beauty—that can be argued. What probably cannot be argued is that money attracts talent. But what if you’re in a zone where the money is plentiful and you’re fighting other parties for the outstanding talent you need? Some great ideas here.

17 Hiring For Success
Andrew Clark
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19 Procurement Driving Compliance
Lorri Kissell
An institution’s lifeblood is its policies. Policies govern all-important aspects of mission accomplishment. Procurement’s role is one of service, but perhaps more importantly procurement saves the institution through its successes in encouraging and enforcing compliance.

20 The Supplier Diversity Institute: Hidden In Plain Sight
Jesse L. Moore
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24 Heard on the Street: New Relationships Deliver New Opportunities for Procurement
Greg Macway
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26 Evolution or Revolution? How to Create Competitive Advantage for Your Internal Client
Andrea Sappleton
To advance as a professional and a valuable resource to your institution, you must learn the ropes of investigating and researching into suppliers, their industries, and the changes that are creating opportunities, as well as threats.

28 Certification: DNF? Never Gonna Happen!
Bob Ashby, C.P.M., CPCM
Labels can be good or bad, terrific or damaging. When it comes to events such as marathons and triathlons, there is no worse label than DNF. Be mindful of Bob Ashby’s plea in this issue’s column. Internalize it and live it—and you are virtually guaranteed good results.

30 Best and Final: Work-Life Balance is a Myth
Blake Reagan, J.D.
How often do we hear and read that balance is desirable and worthy of attainment? Well . . . get ready to be presented with an entirely different message in Blake’s column this issue.
Watch www.naepnet.org for more information on exciting programs that are coming this year!

IN-PERSON EVENTS

NAEP 2016 SUPPLIER DIVERSITY INSTITUTE
July 31 – August 2, 2016
Kansas City, MO

STRATEGIC PROCUREMENT INSTITUTE II: FROM THEORY TO PRACTICE
August 28 – 31, 2016
Denver, CO

COMPLIMENTARY WEBINARS
Visit www.naepnet.org to see a full calendar of complimentary webinars on various procurement topics.

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District II
September 25-28, 2016
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September 25-28, 2016
Minneapolis, MN

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ummer used to be a quiet time—a time for catching up. Most of our students and faculty are gone, and it’s a good time to finish or begin construction and deferred maintenance projects. It’s also a good time to recharge amid a slower pace. Nowadays, though, we don’t always get that needed down time for many reasons, including the invasiveness of technology and the increasing demands on procurement year-round.

Procurement is still in the limelight, and it is still our opportunity to shine. Higher education procurement is rapidly changing and becoming more strategic, whether we are ready for it or not. We must bring more ROI, more opportunity, and more value. Our product lifecycles are shorter. Our constituent base has expanded, and our leadership is asking tough questions. Relationships with suppliers are changing and becoming more collaborative. In fact, to that last point, I use the words “strategic partner” now when discussing our supplier community. Are you being strategic when you work with your suppliers and with your administration?

For all the benefits of a strategic supplier relationship, it does not come easy. Many times we have to educate our university leaders to see the value. Relationships with suppliers are changing and becoming more collaborative. In fact, to that last point, I use the words “strategic partner” now when discussing our supplier community. Are you being strategic when you work with your suppliers and with your administration?

For the all the benefits of a strategic supplier relationship, it does not come easy. Many times we have to educate our university leaders to see the value. Often times, we have to reimagine our own organizational design and culture so that we can move from tactical to the strategic.

NAEP can help you along this strategic path. Download our latest Innovators Forum paper from the website to read the case studies and best practices developed by a cadre of professionals from inside and outside of higher education procurement. There are immediate action steps you can take right now that will help you develop the compelling business case for strategic supplier relationship management.

For years we have advocated for procurement’s seat at the table. As our worldview changes, now is the time for procurement to set our own table and invite our leaders, our suppliers, and our higher education community to sit with us to develop joint goals and determine how we all together can work towards the broader strategic goals.

As you consider your relationships with your supplier community, I encourage you to attend our Strategic Procurement Institute later this summer in Denver. Here you will have a chance to really dive into the practice of Supplier Relationship Management with experts in the field.

Before we start asking ourselves where did the summer go, find time to finish all those projects. Look at your supplier base for opportunities to create relationships. Make time for your summer vacation and come back invigorated for your new campus year.

Doreen Murner
CEO, NAEP
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Imagine what life would be like as a procurement professional if you didn’t have working relationships with your clients, colleagues, executive leaders, and suppliers. Would you be able to fulfill your duties or support your institution’s mission? Would you even be a procurement professional? Highly doubtful. It may sound cliché, but relationship building is a critical skill, especially in today’s rapidly changing landscape in higher education. My boss used to constantly advise that it’s all about the relationships and that it was through those relationships that a university professional could build a foundation for success.

Those of us who have worked in the higher-education procurement setting for more than a decade have witnessed a vast transformation. Technology, business practices, and the cultural climate have changed dramatically. The procurement professional must evolve and stay ahead of the game in order to position himself or herself as a leader. No longer are we the “procurement police” focused primarily on lowest cost, compliance, and opportunistic business relationships. Today, we are value-driven, collaborative, solution-oriented, and adept at navigating the complex network of technology. As I read Oregon State University’s (OSU) Strategic Plan and listened to our President’s messages, it’s clear that the top priorities focus on providing an affordable high-quality education, generating revenue, and finding innovative ways to expand OSU’s...
“Procurement touches every organizational unit at one time or another. We must build relationships with the subject matter experts in these areas and share that knowledge.

On countless occasions, our procurement staff has been the conduit to connect these stakeholders.

Taking the time to get to know our stakeholders and build good relationships is critical to the success of procurement professionals and their departments.”

footprint in order to make a positive impact locally, nationally, and globally.

Strong professional relationships are what help us to stay engaged and successfully navigate this continuously changing environment.

Effective Communication

It all begins with effective communication. It sounds simple, but in reality it can be complicated. Applying mindfulness, listening to what isn’t said, and understanding that people are different in the way they observe things can make good communication a real challenge.

“To effectively communicate, we must realize that we are all different in the way we perceive the world and use this understanding as a guide to our communication with others.”

Tony Robbins

Let’s look at mindful communication. Do you really understand your customer’s needs? Are you sought as a go-to person at your organization? People appreciate approachable professionals who are open-minded. They seek subject matter experts who share their ideas, information, and solutions clearly and understandably. There is no secret key to becoming a mindful communicator. It takes a balance of sometimes-contradicting techniques. There are ways to essentially say “no” without cutting off further conversation and collaboration. Identifying and offering alternatives keeps doors open to an unobstructed path towards a solution. You can be the most knowledgeable person in your department, but if you are seen as someone who only voices concerns without offering solutions then people are going to avoid you. Attitude is everything, and maintaining a helpful one will bolster the effectiveness of your communication.

It’s not only how you communicate, but the method you apply given the situation. Twenty years ago, procurement professionals had few vehicles for communication. Think about how frequently we now communicate and the variety of ways: email; meetings; instant messaging; video conferencing; blogging; texting; or person-to-person. We need to master all forms of communication and use the method that best suits the circumstances. Bottom line: The more effective our communication, the better our relationships.

Value Diversity

Those in higher education procurement operate in a diverse environment. There is a wide range of ages, backgrounds, cultures, and expertise among faculty, staff, students, local communities, and suppliers. Add to that the fact that the institutional functions we support are also diverse. Procurement has an impact on technology, student learning, research, international programs, revenue streams, facilities, student activities, housing, dining, and entertainment. Procurement touches every organizational unit at one time or another. We must build relationships with the subject matter experts in these areas and share that knowledge. On countless occasions, our procurement staff has been the conduit to connect these stakeholders. Taking the time to get to know our stakeholders and build good relationships is critical to the success of procurement professionals and their departments.

NAEP Can Help You Build a Meaningful Network

Meaningful networking is an art that takes time; it must be well managed. It doesn’t always make sense to participate in every opportunity to network, and those opportunities should be focused on naturally connecting with someone. Focusing on quality rather than quantity is important. Know what you want, and develop a plan to get there. But keep in mind that it’s not all about what’s in it for you.

“It’s better to give than to receive. And never keep score. If your interactions are ruled by generosity, your rewards will follow suit.”

Keith Ferrazzi, author of Never Eat Alone: And Other Secrets to Success One Relationship at a Time

Your Membership in NAEP offers myriad opportunities to network and develop meaningful relationships and to share and gain from one another’s experience. Through your contributions, you can make natural connections with procurement professionals, enrich your experience as an NAEP Member, and at the same time, strengthen the association. Serving on a committee, running for office, participating in NAEP forums, writing an article for the Journal, or offering suggestions are just a few actions you can take to ignite productive and long-lasting relationships and enhance NAEP’s value to us all. You’ll find that the experience will lead to further opportunities that multiply your meaningful relationships. This will help you build a strong network that will strengthen your value proposition and add more relevance to your organization. Best of all: You’ll make friends. The very first person I met at my first NAEP Annual Meeting is someone who has become a great friend, and today our relationship is stronger than ever. Amazing! It really is all about the relationships.

Kelly Kozisek, CPPB, CPPO, is the Chief Procurement Officer at Oregon State University. Currently the Department Head for Procurement, Contracts and Materials Management, Kelly has almost 29 years of experience in higher education procurement. She serves as the Chairperson for the NAEP 2016 Program Committee and has presented at the District VI and annual meetings. Kelly received her B.S. in Business Administration at Western Oregon University. She took office at NAEP President in May 2016. Email: kelly.kozisek@oregonstate.edu.
They say everything is bigger in Texas, and for the 2016 NAEP Annual Meeting in San Antonio this past May, it certainly was! With more than 425 attendees and 106 suppliers from a packed Exhibit Hall, NAEP meeting attendees took over the famed River Walk.

Our Monday keynote speaker, former GSA (U.S. General Services Administration) Administrator Martha Johnson, shared her story of being a resilient leader in challenging times. Our Tuesday keynote speaker, Lucas Daniel Boyce, inspired us with his incredible journey from a foster-care home to the White House and to the NBA. Our final keynote speakers on Wednesday morning, Donna Brazile and Cal Thomas, led a spirited debate about the 2016 election and the effect it will have on higher education.

In between were 50 educational sessions filled with top-notch speakers sharing their best-practice tips and successful case studies. Many of the educational presentations, in PowerPoint slides, are available on the NAEP website for review and download.

On Wednesday, May 25, NAEP honored our 2016 National Award Winners at a packed celebration luncheon. We are pleased to announce them here:

**Bert C. Ahrens Achievement Award**
Our highest recognition, this award recognizes outstanding contributions to NAEP over the lifetime of a procurement career.
Valerie Rhodes-Sorrelle, MPA, C.P.M., A.P.P.
Grand Valley State University

**Bob Ashby Mentor of the Year Award**
Recognizes an outstanding individual who has been a mentor to a member.
Sandy Hicks
University of Colorado

**Neil D. Markee Communicator of the Year Award**
Recognizes outstanding contributions to the profession through the written or spoken word.
Karen Harthorn
University of St. Thomas—Minnesota

**Volunteer of the Year Awards**
Acknowledges and recognizes the voluntary achievements of Members who have contributed time and resources to benefit the overall goals of the Association.
Debbie Deacy
University of La Verne
Tonia Lawson, CPPB, CPP, CPPM, CGPM
Troy University
Sandy Benoit
University of Richmond

**Distinguished Service Award**
Recognizes extraordinary service to an institution, the higher education community, NAEP, or to the purchasing profession at a regional or national level.
Jennifer Miracle
Kentucky Community & Technical College System

**Jennifer Adling, CTPM**
Texas Tech University

**Judith Rees, C.P.M., A.P.P.**
Embry-Riddle Aeronautical University

**Professional Perspective Award**
Recognizes the best article in our quarterly magazine Educational Procurement Journal
Nancy Brooks, MPA
Iowa State University
For her article: Promoting Procurement to Internal and External Customers in the Summer 2015 issue

**Young Professional in Procurement Awards**
Recognizes the efforts and contributions to procurement from outstanding young professionals who have fewer than 10 years of experience or are under 40 years old.
Sara Luther
University of Nebraska–Lincoln
Houcine Chraibi
University of Nebraska–Lincoln
Alex Orosz
Duquesne University

**Nancy Tregoe Scholarship**
Kevin Holmes
Oklahoma State University – Tulsa

**2016 Sons & Daughters Scholarship Winners**
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Son of Karen Harthorn, University of St. Thomas—Minnesota

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Ensuring a smooth transition and continuity with changing personnel in purchasing need not be an expensive or complicated process. At Philadelphia University, we have measures in place that are innovative, simple and low-cost. Best of all, our process includes empowering and employing students, giving them valuable workplace skills, professional experiences and enhancements to their academic studies.

1. **No central purchasing.** Our university does not have a central purchasing office. While I am the only designated procurement professional on campus, many departments manage their own day-to-day purchases of supplies and materials. I work in the Physical Plant Department, which oversees the largest pool of university spending outside of payroll. Many capital expenditures and strategic buying (furniture, appliances, equipment, new construction, renovations and facilities maintenance and repair operations [MRO]) are managed by Physical Plant. My colleagues and I work as advisers to other departments on purchasing campus standard models and brands.

2. **Shared network drives.** One of the ways we maintain connections with past purchases is through scanned documents stored on our department’s shared network drive. These documents include purchase orders, quotes and proposals (often used as supporting documents for purchase orders), invoices, and other project and purchase correspondence. These scanned documents are available to our staff and serve as records of current and past transactions. I have been employed by Philadelphia University for only a few years, but I can search the shared drive and find out about purchases made many years ago.

3. **Microsoft Outlook.** Most of our department’s communications are made by email. Emails are great for documenting communications and serve as rich, historical records of purchases and projects. It is common practice to ask everyone to archive their business emails and store them on the department’s shared drive. These are must-reads for anyone succeeding department staffers who’ve moved on to other employment opportunities or who have retired. Emails and Outlook Contacts are archived and stored.

4. **Excel spreadsheets.** We used to keep most MRO purchasing summaries in three-ring binders. This was a quick and easy-to-use reference for reviewing past purchases, vendors, and prices. But manual records are hard to search, and handwriting can become challenging to read and comprehend. A few years ago, we replaced those binder pages with a spreadsheet. Now our daily orders are tracked and recorded on a spreadsheet that can be easily word-searched and sorted to find old purchasing information. This purchasing tracking spreadsheet is saved on our shared network drive. It gives our staff easy access to those records from almost anywhere through an Internet connection. In time, this spreadsheet will be converted into a relational database that can hold and manage far more records. Scans of the transactional records for the purchases referenced on the spreadsheet are also stored on the shared drive. This allows researchers to quickly drill down from the tracking record to the purchasing details for every transaction. All this information can be accessed both on campus and remotely.

5. **Student workers.** A major innovation is our approach of employing student workers through our Work Study Program. Students work 9-10 hours weekly during semesters and 29 hours weekly during summer breaks. Students are taught basic purchasing practices for transactional tasks. These steps include sourcing and gathering quotes, comparing bids, and determining the better value (not just the lowest price). They complete Succession Planning

by Kevin R. Gibbs
Philadelphia University
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purchase request forms and fill-in the vendor, pricing, and delivery ETAs. Then, they manage the workflow as their order requests are forwarded through the approval process. Students cannot place orders. Only designated university personnel are authorized. But, once purchases are made, students add those details to the tracking spreadsheet and scan and save the backup documents to the shared drive. Often our students communicate with vendors and end-users more than I do. They have become a professional, competent, and capable workforce. And when I am away (like at NAEP conferences), the students run most transactional purchasing functions in my absence.

6. **Vertical networking.** From the beginning of our experiment in employing student workers, we stressed that their jobs would be far more challenging (and interesting) than the more normal college Work Study assignments. Our students are seen and treated like professional colleagues in purchasing. Very quickly, our vendors and end-users see them as much more than student workers. They are recognized and respected for knowing their jobs and performing their duties at much higher professional levels than would normally be expected. They also train and help prepare their successors. Every semester or academic year, we recruit new students. This vertical networking approach helps us convey the higher performance levels we expect.

7. **Empowerment.** We also empower our students to seek better solutions and approaches. Student workers are often asked, “How would you solve this problem?” Philadelphia University attracts many bright, capable, and talented students. We employ students from diverse academic majors and degree programs. Most of them find ways to leverage their classroom experiences into their purchasing duties and create some very interesting new practices. This process of employing student workers as change agents greatly enhances our overall succession planning. Their efforts are added to the records we keep to help future purchasing personnel.

We have not invested a lot of money in systems and technology to foster our succession planning. Instead, we’ve invested in our people—professional staff and student workers—to build and maintain a robust collection of data, details, and practices to support continuing innovation and succession continuity.

Kevin Gibbs, Buyer, Philadelphia University, serves on the Board of ISM-Philadelphia. He has been an active participant in NAEP committee work. He was Treasurer for District II’s 2015 Annual Conference Planning Committee and currently serves in a leadership role in that NAEP District. Email: gibbsk@philau.edu.

“**Our students are seen and treated like professional colleagues in purchasing.**”
The University of California, San Francisco (UCSF) is an interesting place. Half research engine, half graduate schools, all intertwined with a co-located hospital and splayed across whatever space can be found in the dense 46-square miles that is San Francisco. Butting up against Silicon Valley, the allure of innovation, venture capital, and an ability to think differently have all influenced the culture at UCSF. People who work here are driven and have an attitude that anything can be done. Working at UCSF means changing the world for the better.

That perception is exactly what you'd hope for at an institution focused on improving health worldwide. In 2014, UCSF's four schools topped the nation in federal biomedical research funding in their fields. The graduate-level university as a whole received the most of any public recipient, and second most overall in funds, from the National Institutes of Health (NIH). These highly competitive awards, which totaled nearly $546.6 million, reflect the superb caliber of research on campus. Through the UCSF schools of dentistry, medicine, nursing and pharmacy, and the graduate division, these funds enable UCSF scientists to advance understanding of the underlying causes of—and therapies for—cancer, cardiovascular disease, diabetes, HIV, Parkinson's and Alzheimer's diseases, and others.

At UCSF, we get things done. From the perspective of granting institutions and the public, this is excellent. For the university's administration, this provides significant challenges in finding the right people who can integrate into this environment and meet the needs of our customers. Finding talented individuals with these skills is challenging enough, but the unique geographical situation that benefits UCSF as a whole is a hindrance to hiring qualified staff. Google, Facebook, Apple, and thousands of startups are beacons of innovation for driven individuals. The university can’t compete with compensation and perks these kinds of companies provide. The successes of these companies have also driven up the cost of living in the Bay Area. San Francisco has the third highest cost of living in the United States (behind number two Honolulu and number one Washington, DC), adding an additional layer of difficulty in recruitment and retention.

In Strategic Sourcing, we are matchmakers. Our role is to identify savings opportunities and bring both customers and suppliers to a common understanding to realize that benefit. It requires a unique mix of people and procurement skills to be successful. Because of the challenges, we’ve had to pursue creative strategies in sourcing talent. Here are some we’ve identified and applied.

**Current State: Post and pray.**
Posting a job description and waiting for responses is a risky proposition. It is quite unlikely that your perfect candidate will see your posting or that they will consider working in higher education procurement as fun, challenging, and interesting. If you’re lucky, you’ll be able to influence the most qualified candidate in the pool to join your team, but that sort of local optimization will prevent finding the best of the best.

**Strategy 1: Leverage your vendor sales network.**
Your supplier partners and their vast network of sales professionals who roam your campuses are well positioned to help spread the word about your job openings. Suppliers interact with a focused demographic on campus. Lab suppliers generally hang out in labs. Leverage their networks; they are likely to be happy to help.

In 2014, we were given the opportunity to hire an entry-level Strategic Sourcing analyst. We needed someone to help us run RFX events, analyze contracts, use data to help answer questions, and otherwise keep an eye on our campus business. After two months of recruitment, the talent pool was thin. We needed a more proactive approach. I reached out to my supplier partners, and they were able to solicit interest in the position. Within two weeks of switching to this strategy, we had our pool of qualified candidates. One candidate came from a
referral by a supplier who knew a young researcher who wanted to get away from the lab bench. Not only did she have the right mix of people skills and technical expertise, her understanding of the research environment created opportunities for sourcing that weren’t apparent to us before.

Strategy 2: Develop a talent network.
A longer-term strategy is to build your own talent network. Increasingly, procurement departments are tapping into the academic side to find talent. For example, the University of Colorado and Arizona State University have developed internships and recruit from the Supply Chain Management academic programs. At UCSF, we don’t have undergraduates, so we have been able to build relationships with other local colleges to find students interested in this field. In the past, we have contacted our professors to see whether they knew any recent graduates looking for opportunities.

Strategy 3: Fill the gaps.
Take the time to assess your current team and see what you’re missing beyond the duties and requirements outlined in the job description. In the case above, we immediately discovered the value of the hire: her knowledge of research. No other person on our team had spent more than 10 minutes in a lab since high school chemistry.

Strategy 4: Let your customers hire for you.
Hiring what you don’t already have is a strategy that applies to seasoned professionals as well. In 2009, UCSF kicked off our IT Category Management program with the goal of drastically improving our service to our IT organization and driving value for that group. In years prior, we struggled to serve IT, a very demanding client. As a result, our team was routinely excluded from IT purchasing decisions. The hiring panel was entirely made up of IT managers on campus who (painfully for us) rejected procurement professionals one after another because they didn’t have IT contracting experience or they didn’t have the right knowledge base. In the end, the team found a highly capable candidate who was hired and now leads the procurement effort for IT projects. Over three years, he’s extracted $20 million in savings. He’s created a strategic link between the supply chain office and the UCSF Chief Information Officer. This relationship is being lauded as best in class in the UC system.

These strategies may be novel in their application to talent acquisition, but in reality, these are the same strategies we use to source for our customers. Working with our supplier partners, working with our customers, and performing gap analyses are right within procurement’s wheelhouse. By thinking of your team as the customer and applying creative solutions, you should be able to improve your hiring results immensely.

Andrew Clark is Director of Strategic Sourcing, Supply Chain Management, University of California, San Francisco/Berkeley. He has a Master of Science in Business Administration, Decision Science, from San Francisco State University. In addition to his contributions to the NAEP Educational Procurement Journal, he has published in the Operations Research Journal, Interfaces. Email: Andrew.Clark@ucsf.edu.
Procurement Driving Compliance

by Lorri Kissell
The Audit Group

Regardless of whether a procurement action is sourced through an existing contracted supplier or through a non-contracted supplier identified by an institutional unit, it is the procurement department’s responsibility to assure that the institution is compliant. Not only is procurement the steward of the dollars, it is equally responsible to follow governing policies, regulations, and laws.

Procurement Partners with Internal Clients to Add Value Expertise and Controls

Many processes and policies regulate the purchase of products and services. Institutional governing bodies expect procurement professionals to abide by, and more importantly, to enforce policies. Constituents who manage large populations of employees must interpret policies and procedures and how to follow them, as directed by procurement. In many cases, constituents will go directly to procurement for navigation and guidance.

Procurement Starts with a Want and a Need

If we are fortunate, procurement is brought in at the time the purchase decision has been made and budget allocated. An internal client may have already identified a source and/or may also want to use sourcing. Sourcing simply refers to a number of procurement practices, aimed at finding, evaluating and engaging suppliers. However, the process of establishing the candidate group goes beyond what an internal client may realize. Our engagement and strategic alignment with the internal client will drive compliance from the very beginning, eliminating the need for enforcement at the end. We are better able to develop relationships and educate constituents throughout the process, thus creating a positive and cooperative experience now and in the future.

The management of the solicitation process, along with contract negotiations, can be daunting for an internal client. Procurement develops the mechanics of the processes to obtain the best value, price, and product, while following policy.

Above All, Compliance Is Designed to Protect

Throughout the procurement to payment transactional cycle, internal controls ensure that an institution has a process in place for sourcing, selection, purchasing, receiving, and payment. Whether this is proper identification of a preferred vendor, assurance that all ethical criteria have been met, or adherence to signing authority policy, procurement’s working with an internal client will protect the institution from legal, political or questionable engagements.

To the degree that procurement has control over the end results, the product or services acquired, and the payments made, compliance throughout the process is critical. Compliance relative to payment terms, pricing, rebates, audit rights, taxes, freight, and other areas is vital in preventing error and fraud.

The purchase order (PO) is the governing document that minimizes risk to the institution. It contains the terms and conditions of the institution, as well as the rights and obligations of both parties. The PO is especially important when no formal contract exists. It is also one aspect of three-way matching used by accounts payable (AP) to process payments accurately. The compliant use of POs is a fundamental step in preventing overpayments and potential disputes.

A less than robust procurement policy leaves an institution, and potentially its individuals, at risk for fraud, security breaches, and tax and legal issues. An internal client can be delightfully unaware of the risk involved in not knowing the supplier. An example of this type of risk would be issues that stem from inadequate or incorrect set-up of vendors in a vendor master file, which could lead to fraud being committed by an employee or duplicate payments. If a W-9 form is not collected, the institution is open to potentially significant penalties imposed by the IRS.

Communicate and Educate

There are inevitably going to be people in an institution who will take advantage of gaps in policy for personal gain. Procurement professionals have the responsibility to drive compliance, and while the overwhelming majority of internal clients will want to comply, they may need guidance and education. An internal client has little knowledge of the additional considerations that are built into procurement policy; areas such as diversity, ethics, and conflicts of interest. Educating the internal client will provide support, rather than encourage conflict. Include examples of how lack of compliance costs other institutions.

Continuing education is critical for the procurement leadership and staff. Bad people don’t take breaks; they work just as hard to work around the process as institutions do to enforce it.

The procurement department’s website should make available all policies and procedures. It should be updated regularly. Working with AP professionals to close any gaps is also important. While procurement is the purchasing portion of the transaction cycle, peers in AP also have controls in place to detect and avoid risk. The process should be examined in its entirety, not just departmentally. A thorough examination of the transaction cycle should also build a critical relationship that supports compliance.

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Every other year, NAEP presents its Supplier Diversity Institute, bringing together staff and practitioners from higher education and immersing them in a day-and-a-half of best practices and networking sessions focused on diversity issues in purchasing and contracting. I have been associated with this event since 2005, and it puzzles me why more intuitions don’t take advantage of this treasure. Allow me to highlight my involvement and the benefits I, and my university, have enjoyed because of that involvement.

I didn’t attend the very first Supplier Diversity Institute (SDI), held in Chicago in 2004, but, starting with the second edition, held in Phoenix in 2005, I have been deeply involved with the planning and presentation of every Institute since. It was at Phoenix that I met dedicated people like Ernie Webster, Pat Moore (no known relation), Eddie Jackson, and Doreen Murner, all leaders within the NAEP Membership. This first contact showed me the level of dedication that these wonderful souls have to the goal of expanding opportunities for sectors of our communities that had not yet enjoyed the full fruits of our free-market society. It was clear that I could learn much from these battle-worn soldiers and that I, also, could share lessons I had learned in my years as a small-business advocate.

The second SDI I experienced was held in my backyard of Indianapolis, Indiana, in 2007, less than an hour from Purdue’s West Lafayette campus. It was the first of four consecutive SDIs for which I would actually chair the Planning Committee. It was also the first SDI at which a sitting university president would address the attendees. Martin Jischke, then-president of Purdue, delivered an inspiring keynote speech on the importance of supplier diversity and the role it should play at our institutions of higher learning. It was a proud moment for me, and I regretted not videotaping it for prosperity to experience. It was also the first SDI in which we partnered with local diverse businesses and invited them to meet the attendees at a social reception the evening before the start of the Institute.

The next SDI, in Providence, Rhode Island, in 2010, was highlighted by the caliber of the speakers. Dr. Fred McKinney, President, New England Minority Supplier Development Council, Dr. Melvin Gravely, President, Institute on Entrepreneurial Thinking, Dr. J. Keith Motley, Chancellor University of Massachusetts Boston, and Dr. Charlie Nelms, Chancellor, North Carolina Central University, all presented stirring talks. It was by far the most power-packed SDI ever! The speakers shared their personal commitments to supplier diversity and the important role each attendee plays at his or her respective institution in extending opportunities to diverse firms to successfully compete for university contracts. The value of this SDI was immeasurable.

Following Providence was a trip to Houston, Texas, in 2012. This SDI focused on the exchange of ideas among seasoned practitioners from colleges and universities from across the country. Presentations and panel discussions centered on relevant topics designed to encourage discussion among the attendees during the presentations and during one-on-one networking opportunities. We were led through this process for two-and-a-half days by the “Father of Supplier Diversity,” Reggie Williams. Reggie has been consulting corporate America with respect to supplier diversity for more than 40 years. In 2014, I chaired my final Planning Committee for SDI in
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Chicago, Illinois. This session was highlighted by the celebration of SDI’s tenth anniversary, in the same city where the initial SDI was held. The primary focus of this Institute was the close relationship that was established with the Chicago Minority Supplier Development Council. They hosted an extravagant reception at which our attendees were able to meet some excellent, capable minority-businesses from its local council. Shelia Hill-Morgan, President of the Chicago Minority Supplier Development Council, delivered the keynote, and we also enjoyed a presentation from the National Minority Supplier Development Council Vice President Marcus Miller. Did I mention that Dr. Melvin Gravely once again graced us with a fiery opening session on Leading the Change in Supplier Diversity?

This brings us to the 2016 Supplier Diversity Institute. This year’s SDI will be held in Kansas City, Missouri, July 31 through August 2, and is shaping up to be the best ever. Under the leadership of Fred Coleman III, recently retired from the University of Illinois at Champaign-Urbana, and Darcel Webb, Dallas County Community Schools, the quality and the value of the SDIs continue. The program offers outstanding speakers, concurrent workshops for new and experienced level practitioners, a vendor exhibit, networking activities, and topics designed to strengthen your supplier diversity program—no matter if newly formed or mature in nature. There will be something of value for use in your daily supplier diversity activities. If you haven’t registered yet, do so right away as seating is limited. If you have already registered, spread the word to other supplier diversity staff within your contact list.

The NAEP Supplier Diversity Institutes, in my estimation, is a national treasure that is hidden in plain sight. For more information check out the NAEP website at www.naepnet.org.

Jesse L. Moore was recruited by Purdue University in February 2005 to create its first Office of Supplier Diversity Development and to serve as its Director. His challenge was to increase the opportunities and the number of contracts awarded to women- and minority-owned businesses. Moore has also served as State Procurement officer in the Office of Minority Business Enterprise (OMBE) within the Indiana State Department of Commerce, Executive Director of Economic Development and Small Business for the Indiana Chamber of Commerce, and Executive Director of the Indianapolis Black Chamber of Commerce. Email: jlmoore@purdue.edu.

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In my last column, I discussed a resolution to develop new relationships in the coming year. I knew cultivating these new connections would generate opportunities for procurement growth, but I’ve been blown away by how quickly we were able to navigate that path. This issue, I wanted to go a bit deeper into one story, to provide some insight into the benefits of these strategic interactions.

At the University of California, San Francisco, we have been focusing on non-traditional spend categories to identify new savings opportunities. Construction, the largest area of spend not under procurement control, has always been an attractive target. Our Supply Chain Management Department has no purview over construction spending and is siloed from the construction process by both organizational structure and policy. The only way we have been able to influence purchases in construction was to build a bridge across the chasm.

We strategically hired expertise in construction procurement to start those conversations and develop strong relationships with the Capital Programs team (see Hiring for Success in this issue).

One year later, the opportunities we’re seeing are indicative of a change in the way we procure for new construction and continue to manage the buy for new buildings. We’re exploring bundled deferred maintenance agreements (combining maintenance for systems across multiple locations and for similar systems into a single vendor relationship). Additionally, we are investigating bundling furniture buys for new construction on a multi-year, multi-location development plan. We’re also exploring the restructuring of purchasing and logistics for dangerous goods with a view to rationalizing the occupancy classification (how the space is used) to reduce building costs by hundreds of dollars per square foot.

These new programs contain multi-million-dollar savings opportunities and double-digit return on investment for procurement’s effort.

From a leadership perspective, we are creating a significant reduction in the cost to run and grow the university. These opportunities align directly to the value proposition of procurement and are the highest-value activities we can pursue. Getting here was a result of the strategic decision to focus on building relationships with key customers.

When you enter your planning cycle for the coming year, consider which relationships you’re fostering and how they align to the opportunities to make a difference on your campus.

Greg Macway is the Director of Strategies & Communication in Supply Chain Management at the University of California, San Francisco/Berkeley. He is a member of the Editorial Board for the NAEP Educational Procurement Journal. Email: Greg.Macway@ucsf.edu.
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How to Create Competitive Advantage for Your Internal Client

by Andrea Sappleton
Ramapo College of New Jersey

I have embarked upon procurement endeavors in the healthcare, financial services, pharmaceutical, and currently higher education fields. These transitions reinforce my view that procurement is an area of innovation and flexibility that offers opportunities for individuals to develop transferable skill sets. Regardless of the setting or industry, the old adage holds true that procurement professionals must understand their internal client’s business in order to add value. One skill that has proved valuable throughout my procurement career is the ability to keep abreast of contracted vendors, their competition, and the landscapes of their industries.

Monitoring contracted vendors’ performances is paramount in industries undergoing change or upheaval. Presently, companies that have been in operation for less than 10 years are posing challenges, as they secure customers via enterprise procurement applications, such as Oracle, Ariba, and SciQuest. Cloud-based software is now the newest rage. Will there be further consolidation in the office supply, document retention, travel, or copier industry? Certainly these industry developments and movements pose challenges for professionals. Some of these practices, when used successfully, can enhance and increase efficiency. Such techniques include the following.

Social Media and Procurement Applications

To garner intelligence on a client’s industry, work backwards starting with the vendor’s main competitor. A wealth of information can be mined from social media sites. Subscription to a vendor’s Twitter feed or Facebook page can provide access into its slightly ajar backdoor. Via these outlets, vendors are apt to promote their innovations or reveal their competitors’ weaknesses, while their customers will often candidly reveal opinions and observations about service levels and quality.

This type of exploration could enhance time-critical purchases. Indirect or second-hand information provided on social media may be speculative; the prudent application of due diligence is appropriate. Data should be verified, such as with Dunn & Bradstreet, Hoovers, company financial filings, the Associated Press, or similar reliable sources. Still, social media provides timely information that can offer you the advantage of anticipating potential problems.

You can access mobile procurement applications from state procurement agencies and global organizations (e.g., World Bank). If transparency is important, you can benefit from reviewing data on vendors selected for large-scoped initiatives. For example, the United Nations Procurement Division application details contracts awarded, bidding opportunities, and business seminars.

International E-Newsletters and Blogs

You can develop a deeper awareness of your vendors’ initiatives by subscribing to international e-newsletters and blogs that are industry-specific or that cover a broad spectrum. E-newsletters and blogs from other countries are relevant, especially for global vendors. Colleges that are concerned about human rights issues, sustainability, or vendors’ social initiatives may find that international e-newsletters and blogs are gateways to objective information.

Our college’s procurement team once learned of our water vendor’s involvement overseas because the client had a subscription to an international e-newsletter. My subscriptions include e-newsletters from the United Kingdom, with one focusing on the procure-to-pay industry. I gather information so that when my college decides to embark upon that endeavor, I will be able to contribute to the conversation.

Webinars

Several vendors offer free webinars on topics specific to their industries. These are opportunities for vendors to showcase their innovations, enhance relationships, and discuss accomplishments. Webinars are easily accessible outlets to discover diverse products and services and to learn about vendors that are transforming their industries. Most compelling about webinars aimed at higher education is that they typically feature an institution that is already successfully using the product or service. Learning of another’s innovations can be a catalyst for you to identify ways to improve...
operational efficiency and effectiveness.

To have access to additional vendor information for scrutiny, you should strongly consider establishing memberships in large procurement-organizations and in industry-specific associations. Procurement organizations are willing educators and can cover numerous topics via free webinars. These organizations offer opportunities for others to stay abreast of best practices and ideas. They showcase vendors who are industry leaders.

Research Organizations

Research organizations can provide you with the tools to compare or evaluate vendors. Organizations such as the Institute of Supply Management (ISM), CAPS Research, the Aberdeen Group, and the Hackett Group provide benchmarking data, white papers, and data analytics to validate their findings. Data from a research organization can provide you independent validation of a vendor’s capabilities, strengths, and weaknesses. Risk mitigation is aided through the use of valid matrixes, which can provide both favorable and warning signs. Most importantly, you will be able to gather useful vendor data and, at times, have the opportunity to participate in benchmarking projects.

Peer Institution Websites

Your exploring of peer institution websites will likely prove to be an astute move. Gaining examples of other institutions’ strategies can be surprisingly beneficial. Selling an idea to management is easier with examples of peer institutions that have implemented programs successfully and can serve as references. Your understanding of another institution’s structure and what it has outsourced to whom can shed valuable light on an idea or initiative. You will do well to start with the peer’s RSS feeds, first looking for current news and then proceeding to its procurement page. Policies and procedures manuals can also provide information on improving vendor performance. Website reviews can provide you opportunities to compare priorities and challenges.

Creating competitive advantages for internal clients by using all of these techniques can help you to be more valuable, as well as appreciated.

One caution: Share only pertinent information with your clients. They don’t need to be inundated, just educated. Product innovations, partnerships, senior leadership changes, mergers and acquisitions, and all similar items of information are relevant. An email timely detailing events is appropriate; you can present less urgent information quarterly.

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### Andrea Sappleton, Assistant Director of Purchasing at Ramapo College of New Jersey

Andrea Sappleton, Assistant Director of Purchasing at Ramapo College of New Jersey, has more than 10 years of strategic sourcing and procurement experience. She has completed strategic sourcing of indirect spend, including travel services, corporate services, and human capital management. Prior to joining Ramapo College, she had sourcing positions in healthcare, pharmaceutical, and financial services industries. Andrea holds an MBA from Long Island University. Email: asapplet@ramapo.edu.
I am training to compete in my first triathlon. I am also undergoing chemotherapy for the third time due to the return of my Non-Hodgkin’s Lymphoma.

Undergoing these two trials reminded me of a marathon I ran in Vancouver, British Columbia, in 2012. I have mentioned this race previously. It was one in which I really wanted to quit. My legs were sore. My lungs hurt. I was in a bad mood due to travel and lodging problems. By the five-mile mark, I had almost convinced myself that it was no disgrace to quit, even after five months of training; even though my teammates, coaches and spectators were shouting encouragement; and even though I would suffer the stares and smirks of other racers as I turned around and walked back to the starting line.

What stopped me? After each race a runner’s time and ranking is listed for all to see, anyone who fails to complete the race will have “DNF” posted next to his/her name. DNF: Did Not Finish. Finishing in the back of the pack was okay, but I refused to be branded as a DNF!

This brought to mind an NAEP Member who I was helping prepare to take the Certified Purchasing Manager (C.P.M.) exam, just prior to it being replaced by the new one for Certified Professional in Supply Management (CPSM). As passionately as possible, I explained that time was of the essence, because only a small window of opportunity existed before the C.P.M. exam would no longer be offered. I further explained that a Lifetime Certification designation was available with the C.P.M., whereas no such designation would be available with the new CPSM. I emphasized the absolute need for either a college degree or a professional designation, if the individual wanted to improve career opportunities or build stronger protections in times of layoffs. With this intense cajoling, I managed to lead the Member successfully through the first three of the four exams. But I have lamented ever since that all of my pleading went for naught, as the candidate never made the time to take that last exam, and later became a victim of a downsizing action. I still wonder what more I could have done to keep that DNF from appearing after her name.

I also thought of two gifted high-school soccer players who were friends, one a senior, the other a sophomore. The very gifted senior let the accolades heaped upon him cloud his thinking and quit seeking better, more experienced coaching. He chose instead to offer his services to an elite traveling team. He did not understand that there was a plethora of gifted soccer players his age and that it took a quantum leap in talent and skill to reach that next level. By not taking advantage of available coaching opportunities, his skills did not sufficiently improve, and his soccer-playing days ended. His climb to the top ended with a DNF.

The young sophomore, on the other hand, realized that her best chance to reach the next level was to seek out the most gifted coaches. At each level, she eagerly let these teachers demonstrate what she needed to know to continue growing and competing. The result is that she is being scouted by both college and Olympic coaches. What a great future! And all because she was willing to pay the price to never be labeled DNF.

As for my triathlon training, I engaged the services of triathlon coaches who, after watching my skill set, observed that I can’t swim and don’t know how to ride a road bike. My choice was either to deny their assessments or rely on their expertise. I certainly won’t realize my dream without taking advantage of their expertise and guidance. No DNF for me!

One side benefit of my new battle with the Non-Hodgkin’s Lymphoma is that many friends have shared books and websites about non-traditional treatments and cures. While I have enjoyed learning about them, I also remember that my coach (oncologist) has brought me through two previous cancer battles. My options, therefore, are to try these new alternative methods or go with my coach and his proven track record. Since I want to finish this battle, I’m staying with my coach.

Doesn’t it make sense for you to take a similar tack as you race along your chosen career path? Are you pursuing a college degree since that is a proven strategy for preparing for career opportunities? Or perhaps you are in the process of obtaining your professional certification since that, too, shows you can compete in any race you enter. Whichever you choose, please don’t let DNF be responsible for losing out on promotions and similar opportunities.

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Work-Life Balance
Is a Myth

by Blake Reagan, J.D.
University of Tennessee

For two weeks, I’ve tried to think of something interesting to say about contracts. I’m not able to. Instead, I’ll share some thoughts about professional life in general. I’m writing this column on New Year’s Day weekend, and a couple of weeks before my birthday—indeed, a time for reflection.

Do you believe in work-life balance? I don’t. Like Santa, it’s a myth. I have a fundamental problem with the phrase because it assumes some objective standard or natural state against which to measure the amount of hours someone works.

Further, why assume that balance is a good thing? Sure, balanced tires or checkbooks are good. But, when you go to a funny movie, do you hope that the director balances comedy with some other emotion? Do you hope that your romantic partner’s good personality is balanced out with average looks? Do you hope that the designer of a rollercoaster balances the thrills with the mundane? Of course not. So, unlike kindness, good health, or empathy, balance in and of itself is not desirable.

The fact is that most top performers are not balanced people. One of my favorite books is Relentless by Tim S. Grover. He details the lifestyles of those who reach the top of their professions. Grover trains professional athletes for a living, so his book focuses primarily on them. Did Michael Jordan put in a mere 40 hours a week? No. He worked obsessively and far more. To be a champion, one must be obsessed, and the most successful people work the hardest and care the most.

In one of the most powerful sections in the book, Grover explained the “quiet melancholy” of victory that highly motivated people feel when achieving something. They don’t feel much joy because the bar is now higher than before. Success is in the past, and it is time to move to the next challenge. In an old Reebok commercial, former Dallas Cowboys running back Emmitt Smith was mid-set in a bench-press exercise, and while looking into the camera, he says: “I just won the Super Bowl, so I can rest now.” Within two seconds, he begins another set of repetitions. The point? There is no off-season; there is no rest; there is no balance for the truly successful.

The former Chairman of General Electric, Jack Welch, once said, “There are work-life choices, and you make them, and they have consequences.” If you want to work 40 hours per week so you can spend more time with friends, family, or on hobbies, that’s fine. I respect that. However, you must accept that doing so will mean that you will not advance as quickly as someone who is equally skilled and works more, just as I must accept that my long hours are harmful to my friendships. Fortunately, most of my friends are also highly motivated people and therefore understand my long hours.

One of my heroes, Dr. Neil deGrasse Tyson, has noted that imbalance leads to innovation. I’ve experienced this in my own professional life. In 2011-2012, I was overwhelmed by my employer’s contract volume, and I found myself working seven days per week, usually 10-12 hours per day. So, I implemented a program that cut our library subscription license volume by 70 percent and another program that reduced signature time by over 90 percent. If I had focused on working a mere 40 hours per week, I would have never implemented these innovations.

I accept the consequences of working an average of 70 hours per week, six to seven days per week. I am also in school pursuing a third degree, and I spend my free time in the gym or pursuing self-study. I have friends, but far fewer than I did before I started working so much. If you find long hours stressful, that’s fine; I gather that most people do. However, I find long-hours relaxing. Nothing feels as good as achievement and success.

Do you know anyone in your life who is working smart and hard? I ask you to stop discouraging highly motivated people by telling them to achieve a balance in their lives. Instead, tell them that you are proud of them; tell them you admire them; or, tell them that you don’t know how they do it. But, whatever you do, don’t tell them to modify their life to fit some balance.
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