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Congratulations to all of our regions and districts that have already held your meetings! Thank you to the sponsors, suppliers and partners who have supported these efforts. Please visit www.naepevents.shutterfly.com to view the pictures that have been shared with us so far. If you have pictures you’d like to share, send them to jharget@naepnet.org.

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I’m Talking About Partnerships

Ham and Eggs. Toast and Butter. Fred Astaire and Ginger Rogers. Alone, they are each wonderful, but together they are sublime.

Perhaps it was not always so. Eggs are used in many ways, not just with ham. Toast, in its original incarnation as just plain old bread, is a staple in many dishes. Partnerships are not exclusive, nor do they exist in a vacuum, but when appropriate, a partnership elevates the pieces (take Fred & Ginger, for example) to an iconic stature and also helps express each individual’s highest potential. Just remember that Ginger did everything Fred did, except that she did it backwards and in high heels! If she were dancing alone, we’d never know that she could manage a feat like that.

This spring and fall we were honored to have the opportunity to partner with some of our regions to develop the systems and processes that will take our Association and our regional groups—and ultimately, the profession—to new heights. It was an enlightening experience that gave all of us greater insights into needs that go across regional boundaries, and needs that are unique to each region. We had some successes and some challenges as with any major initiative that you would undertake at your own university. When you roll out a major project, you encounter multiple requirements, varied skill sets, and even some challenges. But you persevere because you know the success of your initiative—be it a p-card program or contract compliance—will advance and benefit your university. We too, persevere and endeavor to roll up every region’s collective experience to make the processes better and volunteerism ultimately easier.

The most important takeaway from this process is simple: We are all in this together. When we solved an issue or acted on suggestions from one region, the others benefitted. That is partnership—among regions, and between regions and the home office.

Our regional leaders work very hard in their volunteer roles to deliver quality education, events, and resources on a local level. This is especially important for those on travel restrictions. One of the most challenging aspects of regional leadership is that it churns on an annual basis, and turning over the institutional memory from one group of leaders to the next can be a monumental task. The systems that we are building are intended to streamline those regional processes. We are grateful to all the regions and their leadership for their vision and, their time, energy, and efforts in helping us build this infrastructure for the good of the whole. We are privileged to work with all of you, and look forward to 2011, and if we need to put on our high heels and dance backward, we’re ready, willing, and able to master that skill!
It’s frightening how busy we have become over the last several years. Most of us have seen all or some combination of the following:

- Reductions in staffing;
- Increases in reporting or oversight needs due to ARRA or other federal funds;
- Increases in the pace of procurement;
- Pressures to automate through software and web applications;
- Increases in p-card uses and limits;
- Myriad of other pressures due to advances in technology and the enlarged expectations of our campuses.

One casualty of the race for speed and technology has been contract compliance. Many of our major contracts have moved to some electronic means of ordering. This may be through a software application like SciQuest® or through other similar services. These facilities allow users to access thousands of items from our vendors, which are supposed to be discounted to meet our contract pricing. The big question is “Are we getting the contracted price on every purchase?”

You would think that with the advances in technology that this would be an exact science. We shouldn’t even have to worry about this at all. Several recent experiences and stories have led me to believe that contract compliance may be more important than ever. One problem with technology is that the systems that make prices universally correct can also make prices universally incorrect. Recent experiences…

One of our vendors made an upgrade to their web catalogs, and upon implementation of that upgrade, our prices converted back to list price. Luckily, a user noticed the discrepancy and called our office. Upon investigating, we found almost 100 transactions that were overcharged. The total was only $5,000, but this all occurred in a short time-frame. I also learned of a vendor who, over a two-year period, overcharged more than $250,000 on a contract. This occurred because of errors in applying the correct pricing template.

Other examples include vendors charging double, triple, or even ten times a contract rate.

If you don’t think this is reality, go talk to the sales reps for your larger contract vendors and ask them how discounts are calculated on their catalog items and what solid evidence they can give you to demonstrate that the correct discount is being applied. My bet is that they will have a hard time satisfying your professional skepticism. They probably hope, like we do, that the prices are correctly applied automatically, but I am betting they aren’t in all cases.

I offer some simple steps (although significant time and work may be involved):

1. Get a copy of your contract and discount or pricing structure.
2. Contact the vendor and ask how they apply the discounts to your online catalogs, quotes, and other orders.
3. Pull a small sample of items purchased (from your ERP, e-commerce system or copies of invoices).
4. Get catalog or part numbers and have the vendor provide you with the list price and the contract discount.
5. Compare the calculated price with what you were charged.
6. If errors or discrepancies are found, increase the sample.
7. If major discrepancies are found, contact the vendor, correct the issue, and request reimbursement.

Many of you may already be doing this, either manually or through software. For those of you struggling to find the time, the time has come nevertheless. Your clients expect it.

Cory Harms, M.S., 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: c harming@iastate.edu.
Standing Up a Campus Overseas: A Diary, Sort Of

“Unlike many similar institutions of higher education, OU does not have a facility or an Oklahoma-branded semester or year-long program of its own anywhere in the world… Arezzo’s location, history, and size make it an ideal location for the first OU center abroad.”

by Burr Millsap, CPA, MBA
University of Oklahoma

At the University of Oklahoma (OU), Norman campus, many of us were wondering why in the world our President was making so many trips to Italy. True, he is a former U.S. Senator and has friends in high places all over the world. But, at some point you’d think he would slow down a little and stay closer to home. Since he took over the reins of our university in 1994, he has invited world leaders to visit and speak to our students. Margaret Thatcher, Henry Kissinger, George H.W. Bush, Leon Panetta, Al Gore, Rudy Giuliani, and Supreme Court Chief Justice John Roberts are among the leaders who have walked our fair campus and talked to our bright students.

But why Italy? Why now? The answer was soon to arise: an old, vacant Santa Chiara monastery in Arezzo.

Wrote Zach Messitte, OU’s International Program Director and Vice Provost, in a white paper justifying occupying the monastery via a long-term lease:

“The OU in Arezzo initiative will allow the University to develop its own program that appeals to a much larger group of students by offering classes taught by OU faculty, administered by on-site OU staff, and housed in an OU-run center that takes a more hands-on approach to all facets of the study abroad experience.

“The OU in Arezzo initiative will allow the University to develop its own program that appeals to a much larger group of students by offering classes taught by OU faculty, administered by on-site OU staff, and housed in an OU-run center that takes a more hands-on approach to all facets of the study abroad experience.

“Arezzo is a picture-postcard Tuscan town of nearly 100,000 people, about 50 miles southeast of Florence. Known for the frescoes of Piero della Francesca, and more recently as the site for the filming of the Oscar-winning film Life is Beautiful, it is centrally located on the Rome-Florence train lines. Arezzo is also home to the University of Siena at Arezzo, with 3,500 students on a small campus. The faculty is known for its Literature and Philosophy Departments, as well as strong programs in film and media studies, economics, and computer science. OU has had a formal relationship with the University in Arezzo since June 2006 and the summer Journey to Italy program started the same year. Unlike Florence…Arezzo is off the normal tourist path and a welcome home to a small number of American exchange programs.

“There are several peer…institutions that have well-developed and successful programs in Italy. This group includes, among many others, Texas A&M, Iowa State, Arizona, Georgia, Michigan, Vanderbilt, Dickinson, Syracuse, NYU, and Johns Hopkins. These programs are able to draw students from across their campuses and from other American universities.

“Unlike many similar institutions of higher education, OU does not have a facility or an Oklahoma-branded semester or year-long program of its own anywhere in the world…. Arezzo’s location, history, and size make it an ideal location for the first OU center abroad. OU in Arezzo departs from the reciprocal model in that it will have OU faculty and staff in residence, as well as a facility that might be first leased or later purchased.

“OU should have, at the very least, one full time staff member and one OU faculty-in-residence in Arezzo by fall 2010…. Many American programs make use of expatriates who live in Italy or Italians with a strong command of English and good connections to serve as their in-country staff. The staff takes care of the myriad of Italian...
bureaucratic requirements, (student visas, etc.) and the administrative needs of students (credit transfers, housing, safety, security and overall functioning of the program). Ideally, this person should, at a minimum, be familiar with the Italian and American academic systems, have perfect fluency in written and spoken English and Italian, and have excellent connections with the University of Siena at Arezzo and the town of Arezzo.

“Foremost, an OU Center in Arezzo becomes a home base for OU students on the program. At a minimum, the OU center should have a classroom, a computer lab, faculty and staff office space, and some general meeting area. The OU Center in Arezzo should be in the centro storico and close to, if not actually on, the campus of the University of Siena at Arezzo. . . . The advantages of an all-inclusive facility are numerous:

- Avoid the hassle, costs, and administration of renting numerous apartments all over town;
- Additional space for conferences, alumni tours, and other student groups;
- Allow for Italian and Erasmus exchange students to dorm with OU students;
- Give a sense of safety, security, and comfort for OU students and their families.

“This kind of facility would create a world-class program with a true international footprint. . . .”

As you read this, our Chief Financial Officer and In-House Legal Counsel are busily working with both stateside and Italian attorneys on the lease agreement for the monastery. Without an Italian attorney, the process is hopeless. We need someone who thoroughly understands Italian real estate law.

From a procurement management perspective, there are understandably numerous challenges. Here is a paraphrased communication from our person on the ground in Arezzo.

As you can imagine, I am in an unusual situation here. In the process of teaching and organizing the semester and summer programs I ‘float’ the financial situation. I pay out of my pocket and then get reimbursed. This would be fine if it weren’t for the time frames and the amounts, not to mention the currency translation and the potential to mix personal and university funds.

These are a few of the situations that require spending:

- Travel for university and Arezzo folks—food, hotels, transportation, museum entrances;
- Classroom costs for art history, which requires taking students all over Italy for on-site lectures—hotels, food, museum entrances, and transportation;
- General office costs—computers, printers, paper, Internet access, paper, ink cartridges, and the odd piece of furniture or filing cabinet, etc.;
- General operating costs driven by the situation that my office and the students study center is my house—gas, water, electric, and general wear and tear;
- Costs associated with the development of the monastery project—technical language translation fees, lawyers’ fees, architectural consulting fees, etc.
- Travel costs for stateside trips to the university—flights, food, transportation;
- Occasional housing deposits for semester students—sometimes, no way to secure an apartment here unless the landlord gets a deposit first;
- Transportation costs for incoming students from various airports around Italy and for those students from the previous semester who help.

Please also keep in mind that that best-laid plans can go awry. For example, though you purchase a train ticket for a certain date there is no assurance that there won’t be a sudden strike, requiring finding alternative transportation. This may seem superfluous but with 20 tired kids on a deserted train platform at midnight, a Plan B is a must for security’s sake.

A credit card will be very useful for most major transactions, but cash is needed for many vendors, especially to negotiate money-saving prices (from five to 25 percent).

Looking forward to your response.

And here is the response, paraphrased:

The purpose of this e-mail is to brief you on a meeting I held here regarding settlement methods. But first, and related to that, purchasing has taken immediate steps to get you a controlled value card (see #1 below) as soon as possible.
In the meeting, I conferred with our Budget Director, CFO, Controller, Accounts Payable Supervisor, Associate Purchasing Director, and Procurement card Administrator. We discussed the approaches to handling the transaction-settlement challenges in Italy. While the six recommended methods (below) may appear to be “overthink,” they should be useful tools for you, and enable you, your folks, and the University to stay in compliance with governing laws, regulations, and policies. Of course, your feedback is critical, so thank you in advance.

1. **Controlled value card**: This would operate substantially the same as a credit card except that it would have a per-purchase dollar limit and an overall dollar limit within a specified time. When you submit the appropriate usage documentation, it can be replenished. Examples: Travel for students (but not your official travel which would be handled by #3 below), small equipment, office supplies, incidentals.

2. **Petty cash**: This could be used as needed for the types of purchases best fitting it. Examples: Local purchases with suppliers who will not accept a credit card: taxi fares, office supplies, incidentals. When you submit the appropriate usage documentation, it can be replenished.

3. **Reimbursement from the University**: This would operate the same as now for those certain kinds of transactions. As now, this would handle your official business travel for yourself.

4. **Reimbursement from the Foundation**: This would reimburse you for those expenses that could not otherwise be reimbursed by the University. Example: advanced deposits.

5. **Direct Pay**: In certain situations it may be possible for you to submit an invoice to our finance and accounting office to pay directly. Services should be paid this way in order to comply with IRS reporting rules.

6. **Stipend**: This would be an additional—and taxable—amount that could be paid to you. It will require further discussion.

Because the University must continue to maintain internal control for tax, audit, and operational purposes, you will have substantially the same accountability requirements you have now. The main benefit is that you will not have to front your own funds in so many instances.

The story continues as does the learning by our administrative and purchasing staffs. Clearly, when operating in a foreign country, there are situations that don’t fit the ones normally contemplated by the policies and procedures currently in effect. Of course, the challenge is to meet the mission without putting the institution at risk legally or financially. Per one of the maxims of superb customer service, “The answer is Yes. We just have to figure out how without going to jail.”

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Cloud computing” has been blowing across the country for several years, taking some organizations by storm while others hunker down to ride out what may only be a short spell of bad weather. Like other innovations, it has its early supporters and adopters—some of whom become uninterested when the “cloud” does not deliver as expected—while many take a wait-and-see approach, or dismiss it altogether.

What is “The Cloud?”

Cloud computing refers to using common IT services such as e-mail, document production, and data storage by means of the Internet, with the underlying hardware and software supported by the service provider. Some organizations have embraced it as a way to provide up-to-date technology services at reduced cost. Others hold off for a variety of reasons, not the least of which is concern about risks in moving to such a new business model. There’s nothing wrong with either approach; it’s a reflection of many variables in an organization, including a “risk appetite” or tolerance, and how many other projects are competing for attention.

Identify Risks before Contracting

Like other technology service contracts, cloud computing needs to have the underlying terms and conditions nailed down to both parties’ satisfaction. A significant aspect is to identify, define, and allocate the risks between the parties. While many of the boilerplate terms and conditions used for other types of technology contracts also apply, cloud computing presents unique risks in that an organization’s data is stored in someone else’s infrastructure, potentially anywhere in the world. What kinds of data you put in the cloud, and what terms the cloud provider will accept can determine the degree to which cloud computing is a good approach for your institution.

The University of Washington (UW) uses an Enterprise Risk Management (ERM) approach to assess cloud computing, as described below. Taking the ERM assessment into contract negotiations, UW has executed agreements with two major cloud computing providers. A set of principles to use in future cloud negotiations has been drawn from that experience, and they are summarized at the end of this article.

Using ERM Tools to Assess Risks

UW developed its ERM program based on the COSO1 cycle of risk identification—evaluation, response, monitoring—and has applied it on over a dozen types of risks. IT security was an early risk assessment, and UW’s Chief Information Security Officer (CISO) found ERM to be a useful way to communicate risks associated with cyber security and exposure.

When asked to participate on a team looking at how UW might implement cloud computing, the CISO used ERM. Some risk examples include:

Compliance: Failure to meet data management requirements (public records, FERPA); failure to demonstrate “due care” under Federal Rules of Civil Procedure.

Operations: Loss of data integrity, or loss of data access; unnecessary breach notice with associated costs and reputational loss.

Financial: Theft of data resulting in unauthorized expenses (credit card accounts).

UW ERM assessments use standard scales of likelihood (occurrence rare/less than once in 10 years; to almost certain/more than once a year)
and impact (estimates of injuries, financial loss, loss of assets, interruption of service, reputation and image).

Ratings of 1 to 5 are plotted on a matrix, with high scores (20-25) being the top, “hot” risks, colored red. The scale of risk ratings is:
- Red (Extreme): Significant capability loss; unlikely to achieve objectives;
- Orange (High): Significantly degrades achievement of objectives/capability;
- Yellow (Substantial): Degrades achievement of objectives/capability;
- Green (Medium): May degrade some achievement of objectives/capability;
- Blue (Low): Little or no impact on achievement of objectives/capability.

Comparing Risk under Different Circumstances

UW’s then current environment held a high interest in making cloud services available to students and faculty, a growing number of whom were already signing up individually for free services. The first draft of the provider’s proposed contract was viewed as being a long way away from addressing the main risk concerns.

The CISO assessed the likelihood and impact of risks under several business alternatives scenarios:
- A. Current environment: Individuals use cloud services, but no institutional policy or contract in place, i.e. keep doing what we’re doing;
- B. Adopt a use policy to inform individuals of appropriate use, but continue without a contract in place;
- C. Negotiate a contract that includes terms to address risk concerns, in addition to an institutional policy.

What the Analysis Revealed

The risk assessment identified different levels of exposure and ranges of alternatives. The current environment, which let individuals do pretty much whatever they want, carried a High risk of failing to demonstrate due care, and a Substantial risk for data thefts.

By adopting a policy that informs users about appropriate use of cloud services, UW would expect to do better, i.e., reduce its exposure to due care and data theft risks (although due care was still assessed at the Substantial level). Exposure to loss of data integrity and access would be reduced.

Moving to the third business alternative, negotiating an agreement addressing these concerns and obtaining satisfactory terms would lead to improvement on almost all identified risks except for unnecessary breach notice which was raised to the Red (Extreme) risk level. Cloud providers made contractual assurances for data protection and security; what they had not agreed to was access to their files when a breach may have occurred. UW needed to do its own forensics on what information may have been accessed. Without that ability, it is more likely UW would broadcast breach notices, even in cases where it would not be necessary (such as if the actual limits on unauthorized access could be demonstrated).

Lessons Learned

UW is confident that the contract terms—with Google for Apps for Education, and with Microsoft for Live@edu—address risks in a way that cloud services can be offered to most faculty and staff and students. Other institutions, some even several years ago, have moved their student e-mail to the cloud, but UW is among the first to offer it more broadly to the campus community. There are exceptions: individuals who handle data restricted for export purposes are not to use the cloud; and there is a ban on using the cloud for any patient/HIPAA related data.

Is It Right for My Organization?

No matter the type or size of your institution, a risk assessment can provide a structured review. The answer will be unique to your organization, “Are these risks we can accept, or do we need to manage or mitigate them to a level we can accept?”

When Might I Do a Risk Assessment?

Even though a service contract may be new for your organization, is it fairly well established in the marketplace? If yes, a risk assessment may not add value to your planning.

If, however, it is a new offering, an assessment can help identify risks that will be important to address in your contract. For example, ensure that your organization continues to own all of its data stored on the vendor’s systems.
Key Principles for Cloud Contracts

Most of the following terms have their counterparts in good contract language. Each institution has its own version and preferred wording on these clauses to use as a starting point. The key principles identified by UW include:

- **Security**: Meet industry standards; conduct security audits; vendor responsible for security breaches;
- **Indemnification**: Mutual indemnity for negligent acts and omissions preferred; do not indemnify for behavior of end users;
- **Limitation of Liability**: Prefer no limit on vendor’s liability except to extent loss is caused by University;
- **FERPA**: Vendor is a school official and must accept certain duties;
- **Data Ownership**: University maintains ownership of data stored on vendor’s systems.

One more bit of advice: Don’t fly into the cloud without an exit strategy. Know how the contract terms allow retrieval of data deposited in the cloud. It is unclear what the sustainable business models will be for the long run among the various cloud providers, and as the clouds become more populated with valuable data, they are likely to become more attractive targets for hackers.

Risk Assessment = Contract Terms: A Few Final Words

Whether it is cloud computing or the next, new must-have technology that is enticing your institution, applying a risk assessment model is a good starting point. It provides a set of top risks to address in the contract. Everyone then understands what may be at risk, even if the organization goes forward to take advantage of the benefits that the technology is expected to deliver.

Remember, behind every cloud, the sun is still shining.

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Kerry Kahl, B.A., MBA, is a long-time Member of NAEP, having worked in the University of Washington (UW) purchasing office for more than 25 years. He served as NAEP Northwest Regional President and on the E&I Cooperative’s Board of Directors. Kerry currently splits his time between Enterprise Risk Management, helping assess and prioritize a wide range of risks at the university, and in UW Information Technology, planning and overseeing major IT projects and acquisitions. E-mail: kkahl@u.washington.edu.

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Does the mere word import send chills up and down your spine?

Relax. The jumble of regulations, unfamiliar terms, and time-zone differences become greatly simplified when you are focused on only university-procurement imports and have experienced the process a few times.

Consider your own situation.

How many of the products recently ordered by your institution were purchased locally but manufactured globally? Is the reason you are willing to pay more because your local source adds equivalent value? Or state statute prohibits global sourcing? Or you think global sourcing hurts the U.S. economy? Or, you are convinced that this is one area of procurement you just don’t need to know? Are you sure?

We are in a global economy. Identifying a U.S. manufacturer or distributor who does not rely on international trade for at least part of its supply would be difficult.

Suppose tomorrow a faculty member calls for your help getting some expensive equipment into a foreign country and back to campus without paying expensive customs duties.

Yesterday you responded like the “deer in the headlights,” but tomorrow, after reading this article, you confidently offer advice. You inform that Customs and Protected Borders (CPB) form 4457 should be completed before traveling and that a CPB officer must inspect the items at a local office or at the international airport prior to departure. Equipment and electronics can be listed by serial number so that they are easily identified and can re-enter the country duty-free. Other items can be identified as having been acquired in the U.S. by sales receipts, appraisals, or insurance documents, etc.

How about sourcing and shipping merchandise to your institution from outside the United States?

Asia is a hotbed of activity, manufacturing a broad spectrum of commodities. Geographical trade regions comprise:

- China—Southern China: Fujian, Jiangxi; Eastern China: Shanghai, Zhejiang; Guangdong; Hong Kong;
- Taiwan;
- North East Asia—Korea, Japan;
- South East Asia—Cambodia, Indonesia, Malaysia, the Philippines, Singapore, Thailand, Vietnam;
- South Asia—India, Pakistan, Sri Lanka.

Websites listed at the end of this article identify several sources. Trade councils, such as the Hong Kong Trade Development Council (HKTDC.com), have offices in most major cities and are delighted to suggest proven companies. Further verification can be researched through trade references or reporting companies such as Dun & Bradstreet. Product testing can be done by a global testing company, such as Intertek.

Request for Quotations and Bids

Components of a well-written domestic solicitation are the same for international sourcing with additional attention to the right to receive, inspect and approve a sample prior to production. Remedies should be spelled out, if the sample or order fails to meet the specifications, shipping methods and payment. Reasonably, anticipate longer lead times.

Carriers Versus Freight Forwarders

Your preferred contract carrier or courier service probably has expertise to make global shipping straightforward. Carriers transport freight in their own vessels by air or sea. A freight forwarder may also be a carrier but typically acts only as an agent, taking care of documents such as commercial invoices and bills of lading.
Commercial invoices prepared by the shipper provide information that allows Customs to determine if the merchandise is restricted and/or subject to duties. A typical commercial invoice is stated in English and includes:

- Country of origin (manufacturer);
- Terms of sale;
- Complete description of imported product including serial numbers and product composition (e.g., steel, aluminum, cotton, wool, etc.);
- Values and currency;
- Shipper (seller) name/address; and
- Consignee (buyer) name/address.

Bills of Lading (B/L or BOL) are issued by a carrier to the shipper to attest that the goods described have been loaded onto their vessel. A clean B/L means that the goods were received in apparent good condition. Like a domestic B/L, it contains the following information:

- Name of the shipping company;
- Flag of nationality;
- Shipper’s name;
- Order and notify party;
- Description of goods;
- Gross and net tare weight; and
- Freight rate, measurements and weight of goods, and total freight.

Virtually every international carrier and freight forwarder has a user-friendly website to demonstrate the process. For example, the U.S. Postal Service, which is heavily used by Ebay sellers, is an excellent source of shipping information and regulations by country. The website is frequently updated. DHL, Expeditors International, Federal Express, UPS, and others have similar offerings.

Tip: Shippers generally quote the cost of freight to the first port in the consignee’s (party receiving the merchandise) country. For airfreight, you will want to designate the closest international airport to you to eliminate wasted ground transportation time and to provide easier access to customs clearance. You should review international shipping terms (called Incoterms), which define each party’s responsibilities, to make sure you’re asking freight to be quoted correctly.

Asking for “landed freight costs” includes shipping to the port plus inbound land transportation. My institution’s freight contracts provide for door-to-door service, which ensures the direct flow of goods from the shipper’s location to our receiving dock. It increases our control and reduces the chance of delay. Our designated carriers and freight forwarders are very familiar with the requirements, documentation and personnel of the countries they serve, making it simple to order and receive off-shore goods.

**Payment Terms**

Two of the most common payment terms are:

- “T/T” stands for telegraphic transfer, or in today’s terms, wire transfer. Until a relationship and ensuing trust has been established, shippers commonly protect themselves by requiring prepayment for samples and orders under $2000 (USD) shipped by air.
- “L/C” stands for letter of credit. It is typically used for ocean shipments and is issued by the importer’s bank. It guarantees payment upon presentation of trade documents (invoice, bill of lading, inspection and insurance certificates, etc.). An L/C protects both buyer and seller, as the appropriate documents must be received by the bank before payment is made. When the shipper complies, payment is assured.

Continued on page 18
With air shipments, documents are sent with the merchandise. When letters of credit are used, the documents are sent to your bank.

**Delays**
Some delays are unavoidable. For example, late receipt of polo shirts from Egypt due to the recent volcanic eruption in Iceland. However, most delays are avoidable and fall into three categories:
- Shipments containing prohibited or restricted items;
- Shipments with missing, incomplete, or incorrect documentation; or
- Shipments exceeding country-specific weight and size limits.

**Restrictions**
As with so many other aspects of our jobs, terrorism and environmental concerns have caused changes in federal statutes. Presently, the U.S. prohibits importation of pistachios and carpets from Iran, which were previously available to licensed importers. When the U.S. cut off goods from Myanmar (formerly Burma) rubies from that country, especially the highly desired pigeon-blood colored ones, ballooned in price.

For critical shipments, be aware of national holidays in the country of origin. For example, nothing in China moves during Spring Festival, which is February 3–8 in 2011. Fully understand date and time zones to facilitate communication. Understand metric conversion (find an easy-to-use website).

Understand that CPB—under the auspices of Homeland Security—are enforcing regulations for forty other agencies. They have a lot to look for—glazed ceramics containing lead; knock-off clothing with your university’s logo; infested wood; agricultural products; prescription drugs (keep prescriptions in a labeled bottle; don’t bring back prescription drugs without also producing the prescription; don’t exceed 50 doses).

**Summary**
Are we missing opportunities to improve and expand our sourcing efforts, notwithstanding state and local preference laws and restrictive procurement codes? Understanding the true costs of a product by comparing international and domestic sources will help you advise both requestors and legislators. Advising campus departments about their acquisition planning can make them open to better practices, sources and solutions. Knowing domestic vendor’s logistic challenges (foreign supply-sources, shipping, etc.) allows for delivery of better and more valuable service to departments. Moving sourcing up the supply chain, closer to the manufacturer, can yield savings from fifteen to seventy percent (but an increase in lead time).

**Author’s Footnote**
I find the dynamics of international trade and the impact on our U.S. economy fascinating. In the third quarter of 2010, exports of manufacturing equipment to China from the European Union decreased by 35 percent. Wages in China have risen sharply in just a few months. Many of the largest apparel companies in the U.S. are bailing and moving their production from China to Bangladesh, Cambodia, Singapore, and Vietnam. There doesn’t seem to be a country ready to take over China’s diminishing role, as only India has the labor force, but not the infrastructure. Now you know!

**Additional Resources**
- [www.cbp.gov](http://www.cbp.gov)
- [www.bis.doc.gov/compliance/enforcement/liststocheck.htm](http://www.bis.doc.gov/compliance/enforcement/liststocheck.htm)
- **Trade Portals**
  - [www.yahoo.com](http://www.yahoo.com)
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No Evolution? No Revolution?

by Mike A. Chmielewski, C.P.M.
Law School Admission Council

We started this column, Evolution or Revolution, about two years ago to bring new ideas to the Members by way of the Journal. We have been able to bring you some great information, but it seems like the ideas are “out on holiday,” as the English might say. At least, that is what I am to understand from the paucity (look it up) of responses to repeated requests on the NAEP Listserv.

I find it hard to believe that there is nothing new going on in the trenches. Our profession can’t be stagnating. It is just not possible in this time of tight budgets and major changes.

Over the last two years, purchasing departments have been downsized, merged or, unfortunately in some cases, eliminated. Certainly, travel budgets have been trimmed. This has caused groups like NAEP to change the ways in which we try to educate our Members. Webinars and live broadcasts from conferences have become effective methods allowing those of us who can’t travel to still be able to stay educated.

Tom Fogarty of HACC, Central Pennsylvania’s Community College (also NAEP District II Board Representative), reminded me that institutions have had to become more creative in their methods of fundraising. The money is still out there, but not as much of it. Procurement will surely be called upon to assist in those efforts. We are being asked to assist in disposing of surplus property, using that as another method of attempting to increase the institution’s revenue. I’m sure there must be other ways we are becoming involved. If there was ever a time that purchasing departments can show how they are essential to the institution’s success, this is it.

Technology is constantly evolving. Those changes have to be affecting procurement, along with the other parts of higher education. I know that there are different systems for eProcurement out there; some institutions are using them, but the systems seem to be as diverse as our institutions. Also, the cost of each system helps determine whether or not they can be used.

We are now using more laptops, cell phones, smart phones, etc. Mobile technology is creating new challenges. How are you handling those changes? I’m sure that, in some cases, there are people wanting to use iPads and other tablet-style computers—but are those cost-effective? Do you allow your employees to get the latest and greatest in technology? How do you keep track of the spend involved with the use of this equipment?

As always, we are being asked to do more with less, especially now, with the state of the economy. How are you coping with this? At the same time, our institutions are being pressured to stay green. The students and other customers want us to be aware of the effect our processes and purchases have on our environment. How do you do that and still stay cost-effective? I’m sure many of you are trying to do more things electronically rather than using paper.

We are becoming more of a global economy all the time. Many of us have to deal more with the rest of the world. We can’t simply focus on domestic issues. If you have any international issues, please share them. My institution is doing more international business all the time.

I challenge you to tell me about your challenges. You might be surprised what your colleagues would like to hear, and what might help them in their jobs. My e-mail address is mchmielewski@lsac.org. I look forward to hearing from you.

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Einstein Was an Idiot, A Marathon is Not 26.2 Miles, and Other Musings

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

As some of you know, I am training to run a marathon in Dublin, Ireland. The day before I wrote this article I ran 20 miles, so I had a lot of time to muse. Here are just a few of those musings, and how they relate to NAEPers who know they need to increase their education if they want to compete in today’s job market but haven’t yet got around to it.

First musing: Einstein was an idiot.
While his work eventually led him to be considered a genius, at age 16 he failed to pass an exam to get into his chosen university, the Polytechnic Institute of Zurich, the same institute that would not hire him years earlier as a teacher of mathematics and physics.

Idiot? No! Just a late bloomer. If he had given up on himself, he would have remained a low-level clerk in the Patent Office, and the world would not have experienced his genius.

In my workings with NAEP over the years, I have seen a number of late bloomers who, thank goodness, never gave up on themselves and who finally lived up to their potentials. I have also seen, unfortunately, those who have the talent and ability but who gave up because they didn’t feel appreciated, couldn’t stand to fail, or didn’t have time to push themselves.

Second musing: A marathon is not 26.2 miles long.
I started training for this marathon in May 2010, just two months after finishing chemotherapy. When the Leukemia and Lymphoma Society suggested that I help them raise funds for more cancer research by running a marathon, I told them they were crazy. I asked if they had forgotten that my last chemo treatment had been only two months earlier. I gave them all of the excuses I have heard over the years as to why we don’t have the time, talent, motivation, even when we know we will benefit from the effort.

That was when they explained that I did not have to run 26.2 miles but only for four minutes. That’s right, run four minutes—and walk one minute. Then repeat. And keep repeating right through the finish line. So when I was running my recent 20-mile practice run, that’s exactly what I did, keeping that pace as I crossed the finish line. Sure, there were runners going by me. And, no, I did not come in first. But my goal was to finish what I started; finish what I knew I should do.

Likewise, those of you who are pursuing your educational goals know that winning is not coming in first; it is starting a program of self-improvement and then sticking to it.

At the recent U.S.A.F. Half Marathon (13.1 miles), I finished ahead of 1,130 runners but behind over 2,000 runners. And yet, I did win!

The point? Try making your education or certification goal to keep after it—four minutes at a time! Focus on one class and one test at a time. The winner is not only the fastest one, but also he or she who doggedly keeps after it—four minutes at a time.

Third musing: ISM has just introduced a pilot program for a new certification—Certified Professional in Supplier Diversity.
Will that benefit our Members?
It is brand new, and I will find out more about it and report back to you in the next issue of the NAEP Journal.

If you are interested in pursuing your professional certification, or would like guidance on starting or re-starting your college studies, 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.
A few words about retreats—those perennial off-campus events, where we pause from our daily routine (if the organizers are smart enough to select a location without adequate Wi-Fi or cell phone service) and seek new inspiration. Ranging from elaborate to spartan, retreats are designed to recharge our batteries, which sort of presupposes they’re lithium when, in fact, they may just not be rechargeable.

Retreats are a time-honored tradition. The first mention of a retreat in recorded history was when a Roman slave named Romulus, in 45 BC, asked to be unchained from his duties for half an hour at the next new moon to contemplate the marks on a bench. As luck would have it, the Emperor had booked the ship that day to go water skiing and the request was denied.

When successful, retreats equip us with our best business tools and ideas. When less successful, if you’re on a deadline to write a humor column, they are even better!

The team-building ropes course was one of those. Designed for Everest ascent training (I think), it pushed us to the edge. One woman, obviously terrified, slipped from an upper tree branch and was hanging upside down in a new paradigm and internal organ shift. She was dangling in limbo somewhere between real team bonding and unintentional suicide. I noticed some hesitation from teammates, perhaps because of her curt remarks earlier in the week. Her co-workers finally “descended to the occasion” for the rescue. To hear her tell it, the experience was life altering and “eternal gratitude washed over her.”

Then there was the connect-the-dots theme, replete with boxes of those mound-shaped jellies, which I learned as a young theatre projectionist turn to concrete when dropped into puddles of Coca Cola. Seeing so many of them invoked bad memories. We were allowed childlike playtime to assemble magnetic balls and sticks to reinforce the ideas of “connecting.”

Once, thanks to a Duke University program, we rented a racecar and all became inept pit crew tire changers. The message, moment, and mirth have been frequently recalled and actually resulted in increased customer service.

We frequent a mountain setting, a stunning backdrop to both our facility and Robert Redford’s Sundance Resort. During a mediocre presentation, a cougar appeared atop a rock fence. We may as well have cancelled the remainder of the day as everyone waited for its return, completely ignoring subsequent speakers. A similar distraction occurred when a hawk, caught in an updraft, floated effortlessly outside the window just above the clueless speaker’s head. Of course, we were courteous and refrained from laughter. Yeah, right.

I was once so bored in that room, I began cataloging variations in the total bolt count and in the iron brackets which held ceiling joists together. Desiring to impress the facility manager with my creativity, I showed him my work. He shrugged his shoulders and remarked others had preceded me, including one man who noted a couple of bolts were not fully tightened during construction. Probably the same auditor who thinks I have a screw loose.

Nevertheless, we are always grateful to get away and focus on higher aspirations and education. And, as my local newspaper described similar events for 50 years: “A good time was had by all; everyone came home tired but happy.”

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.
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