



ISM's Southwest Forum presents its

# 64<sup>th</sup> Annual Southwest Supply Management Conference

Co-Sponsored with ISM—San Antonio and the ISM Logistics Transportation Group

*Strength of Networking ... Power of Knowledge — SWSMC Delivers!*



San Antonio, Texas ★ September 30 – October 1, 2010



# Pre-Conference Seminars

Participants who successfully complete a pre-conference seminar will receive the designated CEHs. They may be applied toward ISM recertification and/or reaccreditation program requirements. ISM's consent to provide CEH credits for this educational event is not an endorsement of this program or its content by ISM.

## Wednesday, September 29, 2010



### Seminar A

#### Essential Purchasing Negotiation Skills For Success

8:00 a.m. – 5 p.m. — 7.5 CEHs

Speaker: Tom Tanel, C.P.M., CTL, CCA, CISC M

In *Essential Purchasing Negotiation Skills for Success*, you will learn how to understand the proven traits and skills of an excellent negotiator; sharpen your planning and preparation skills; know the good times and the bad times to negotiate; use the Negotiation Planning Model; use strategy and tactics effectively; select the best meeting area; use your agenda as a negotiating tool; discern the type of bargaining process; learn how to set objectives and assess their strengths; make power and influence work for you—not against you; plus, you will have an opportunity to apply your new skills in practice sessions.



### Seminar B

#### CPSM® Bridge Exam Review Are You Prepared?

8:00 a.m. – 5:00 p.m. — 7.5 CEHs

Speaker: Patrick (Pat) Woods, CPSM, C.P.M.

The educational content of the Bridge Exam will be reviewed, first focusing on Module 1 – Foundation of Supply Management which includes contracting and negotiation, cost and finance, international procurement, social responsibility, sourcing and supplier relationship management. Bridge Exam Review - Parts II, III, and IV will provide a focus on Module 2 – Effective Supply Management Performance will include forecasting, logistics, materials and inventory management, organization/department assessment, planning, product and service development, project management and quality. The focus on Module 3 – Leadership in Supply Management will include leadership, risk and compliance and strategic sourcing. These sessions will also review important test-taking strategies including “trigger words” and “process of elimination” that will be offered during the regular conference offerings.

## Keynote Speakers

### Thursday, September 30, 2010

#### Opening Session

##### Supply Chain – Halo's, Silo's & Bozo's!

8:00 a.m. – 10:00 a.m. — 1 CEH



Speaker: George Adams, TMK-IPSCO, Director of OCTG Sales - Americas

George Adams has a unique view of the supply chain and a very diversified background which comes from 30+ years of working successfully in the supply chain.

He has strategically worked in all three major aspects of the supply chain (manufacturing, distribution and oil industry). Consequently, he is well versed in the cultures of all three. Adams currently leads the TMK-IPSCO OCTG Sales – Americas team. Prior to his current position at TMK-IPSCO, Adams led the BP Gulf of Mexico Materials Management Team, a partner with Premier Pipe (OCTG Distribution), and Sumitomo Corporation Global Tubular Solutions (International SCM Service Centers).

#### General Luncheon

12:00 – 1:30 p.m. — 1 CEH



Speaker: Jan Miller, Vice President, Affiliate Support, Institute for Supply Management™

Jan Miller is ISM's Vice President for Affiliate, Group and Forum Support. Her area has principle responsibility for all assistance provided to, organizational training tools provided for, and serving as the primary liaison between affiliates, Groups and Forums. Miller serves as staff contact for the Affiliate, Groups and Forums Relationship Committee, and three Leadership Training Workshop Committees. Miller is responsible for coordinating all aspects of three ISM Leadership Training Workshops annually, including planning training content

with each of the Leadership Training Committees. Her responsibilities also include member benefits, corporate relationships and oversight of the Journal of Supply Chain Management.



Speaker: Mike Burgett, CPSM, Vice President, Strategic Sourcing, NuStar Energy – and south Texas good ole boy.

Mike Burgett will explore leadership desire and how to recognize behaviors and patterns in our lives that both make or break our leadership success. Self emerging leadership in Sourcing is vital to developing supplier relationships, dealing with professional sales folks, senior management and others in the supply chain. His discussion will range from the nature or nurture debate on leadership creation to recent research on emotional intelligence, leading from the future theory and other novel ways we operate as leaders and followers. Burgett offers a practical approach to understanding leadership motivation from 30-plus years as “boots on the ground management” and will offer some fun, insightful tools and tricks about how our minds work and how we can harness the incredible power within us.

### Friday, October 1, 2010

#### Closing Session

##### The 5 C's of Excellence!

11:30 a.m. – 2:00 p.m. — 1 CEH



Speaker: Sharon McGee, CSHO, President/CEO of R.M. Mechanical, Inc.

Sharon McGee is a featured author in a book titled, “Leadership Defined” and currently serves as Adjunct Faculty at the University of Texas – Arlington and provides instructions to UT students in the area of Safety, Health, and Environmental Programs. McGee is also certified Leadership Trainer for Maximum Impact Speakers/Dr. John Maxwell.

# Schedule of Events

## Wednesday

September 29, 2010

**Continental Breakfast**  
(Pre-Conference Seminar Attendees)  
7:00 a.m. – 8:00 a.m.

**Pre-Conference Seminar A**  
8:00 a.m. – 5:00 p.m.

**Pre-Conference Seminar B**  
8:00 a.m. – 5:00 p.m.

**Golf Tournament**  
12:00 p.m. – 5:00 p.m.

**Conference Registration**  
7:00 a.m. – 6:00 p.m.

**Lunch**  
(Pre-Conference Seminar Attendees)  
12:00 p.m. – 1:00 p.m.

**Networking Mix-n-Mingle**  
(Pre-Conference and Conference Attendees)  
5:30 p.m. – 7:00 p.m.

## Thursday

September 30, 2010

**Continental Breakfast**  
7:00 a.m. – 8:00 a.m.

**Conference Registration**  
7:00 a.m. – 3:00 p.m.

**Opening Session**  
**Keynote Speakers**  
8:00 a.m. – 10:00 a.m.

**Southwest Forum Business Meeting**  
8:15 a.m. – 8:30 a.m.

**Morning Break**  
10:00 a.m. – 10:15 a.m.

**Workshops Session A (Tracks 1-5)**  
10:15 a.m. – 11:45 a.m.

**Conference Luncheon**  
**Keynote Speaker**  
12:00 p.m. – 1:30 p.m.

**Workshops Session B (Tracks 1-5)**  
1:45 p.m. – 3:15 p.m.

**Afternoon Break**  
3:15 p.m. – 3:30 p.m.

**Workshops Session C (Tracks 1-5)**  
3:30 p.m. – 5:00 p.m.

**Exhibitor Showcase**  
5:00 p.m. – 7:00 p.m.

## Friday

October 1, 2010

**Continental Breakfast**  
7:00 a.m. – 8:00 a.m.

**Conference Registration**  
7:00 a.m. – 10:00 a.m.

**Workshops Session D (Tracks 1-5)**  
8:00 a.m. – 9:30 a.m.

**Morning Break**  
9:30 a.m. – 9:45 a.m.

**Workshops Session E (Tracks 1-5)**  
9:45 a.m. – 11:15 a.m.

**Closing Luncheon**  
**Keynote Speaker**  
11:30 a.m. – 2:00 p.m.

## Saturday

October 2, 2010

**CPSM® Bridge Exam**  
**Registration:** 7:30 a.m. – 8:15 a.m.  
**Exam:** 8:30 a.m. – 11:30 a.m.

### Workshop Tracks —

With 25 concurrent workshops, it can be overwhelming to plan your schedule. We've included the following reference guide to help you select workshops. First determine your general training needs or interests and then identify which track suits your requirements or mix-and-match to optimize planning. Transfer session information below to your registration form to ensure space is reserved.

- **Track 1 – Supply Chain Skill Sets for the Next Millinium and Creating Best of Class Supply Chain Efficiency within Your Organization**
- **Track 2 – Strategic Cost Analysis, Next Level Cost Management Practices, and Best of Class Negotiation Practices Within the Supply Chain**
- **Track 3 – Contract Administration Best Practices and World-Class Risk Mitigation Practices**
- **Track 4 – Effective Public Procurement Strategies**
- **Track 5 – Savvy Solutions and Cost Savings for Transportation and Logistics Within the Supply Chain**

### Join Us For An Educational And Networking Experience

- Choose from 25 Workshops
- Learn Best Practices and Reinforce Your Skills
- Earn 11.5 Continuing Education Hours (CEHs)

# Workshops

**Thursday, September 30, 2010**

**Session A — 10:15 a.m. - 11:45 a.m.**

Track 1

## **CPSM® Bridge Review Part I**

Patrick (Pat) Woods, CPSM, C.P.M., CPIM

The educational content of the Bridge Exam will be overviewed, first focusing on Module 1 – Foundation of Supply Management which includes contracting and negotiation, cost and finance, international procurement, social responsibility, sourcing and supplier relationship management.

Track 2

## **Walking Up and Down those Chains – The New Frontier in Cost Savings**

Marilyn Gettinger, C.P.M.

Supply professionals can expect their senior management to demand cost reductions of three percent or more every year, and supply departments will be looking in all of the familiar places for additional savings. There is a new frontier beckoning that holds tremendous cost saving opportunities. The organization's supply chains are the new frontier for supply professionals who are willing to walk up and down the chains.

Track 3

## **How To Tighten Up Your Contracts and Purchase Orders: Part I – Pre-Award Process**

Ken Martin, JD

Stan Dubroff, JD

Most experts agree that pre-solicitation and solicitation planning is critical to successful purchases but that good planning is often inadequate or overlooked in the rush of business, often resulting in subsequent contract formation or performance problems that could have been avoided. This session will present and discuss the steps, events, and considerations associated with needs/requirements identification up through the issuance of solicitations, detailing those areas where legal, contractual, or business problems and pitfalls commonly occur. Coverage will include best practices for effective market research, the content and different types of purchase descriptions/Statements of Work (SOW), the different types of solicitations and their applicability (IFB, RFP, RFQ, RFI, etc.), permissible and effective supplier evaluation and selection criteria, and the importance of establishing and maintaining a "fair playing field" for suppliers throughout the solicitation process.

Track 4

## **Strategic Sourcing Success Factors: How to Achieve Exceptional and Sustainable Results**

Robert Rudzki

Quave Burton, MBA

"Strategic sourcing" as a concept has existed since the 1980s. But, many companies don't employ a robust, comprehensive strategic sourcing process that leverages cross-functional teams within their organization. Leveraging their extensive experience leading successful procurement transformations, the presenters will describe, the role of strategic sourcing in an overall plan for upgrading your supply management activities and organization, essential components, and process map, for effective strategic sourcing, benchmarks of what is possible to achieve with strategic sourcing, in different

categories of spend, learning's regarding the best way to begin the adoption of strategic sourcing - key success factors for building momentum, pitfalls to be aware of, and to avoid, specific processes, checklists and tools that help ensure success, the role that senior executives (i.e., the CEO, COO, CFO) should play.

Track 5

## **The Case for Barcoding Everything: Supply Management Leads the Way**

Ron Grossman, PMC, PCMH, CICS

Although barcoding has been available for decades, the vast majority of small and medium sized companies have not yet taken advantage of the opportunities for accuracy and timely data flow in their organizations. This presentation will guide the Supply Manager through the cost/benefits of implementing such a system. If you provide or utilize any Vendor Managed Inventory (VMI) system, you need this information. If you buy any raw material, components, or finished goods from vendors who don't currently barcode their products, you need this information. If you buy product from vendors who do barcode their goods, learn how to take advantage of the data including such important functions and measurements as reordering, replenishment, and throughput. Advance, accurate information is vital to the Supply Manager. Barcodes, used everywhere, can provide this information. Be in a position take a leadership role in helping your company benefits from integrating "lean" concepts and barcoding strategies into your daily operations.

**Session B — 1:45 p.m. – 3:15 p.m.**

Track 1

## **CPSM® Bridge Review Part II**

Patrick (Pat) Woods, CPSM, C.P.M., CPIM

A focus on Module 2 – Effective Supply Management Performance will include forecasting, logistics, materials and inventory management, organization/department assessment, planning, product and service development, project management and quality.

Track 2

## **Advanced Negotiation Strategies and Tactics: With International Insights**

Dr. Mike McGinnis, D.B.A., CPSM, C.P.M., A.P.P.

This program will blend lecture and in-session exercises to increase the attendee's understanding of negotiation strategies and tactics. Topics include win-win and win-lose negotiations, when win-win and win-lose negotiations are appropriate, cross-cultural differences, and the application of an understanding of cross cultural differences to negotiations with those from other cultures, from other organizations, and within your own organization.

Track 3

## **Risky Business – Event and Portfolio Management for Supply Chain Success**

Marilyn Gettinger, C.P.M.

Supply chain management principles emphasize the importance of customer knowledge, collaborative relationships, dependence on supply sources, total supply chain decision trade-offs, information sharing, risk sharing, global opportunities, etc. Organizations, in the past, have found managing materials within their organization challenging; now the management of materials has expanded to include other internal departments, multiple layers of suppliers and

# Workshops

customers. As the supply chain concept has become a critical factor in the success of an organization, risk and its' consequences have become an even greater threat.

## Track 4

### **Contracting for Services: A Practical Review of the Contracting Process Level – Basic to Intermediate**

Jim Haining, CPSM, C.P.M., A.P.P.

Contracting for Services: Contracting for services differs from the typical purchasing contract for materials. The sourcing process is different and has a different set of challenges. We will review the basics of contracting for services, including what you need to receive from your end users and suppliers prior to formalizing a contract. Some of the important elements include the detailed Scope of Work (SOW), the contract terms and conditions, and the process for finding a supplier.

## Track 5

### **The Untapped Inbound Logistics Goldmine: Making the Case for Identifying Opportunities and Cost Savings: Part I**

Tom Tanel C.P.M., CTL, CCA, CISC

Ron Grossman, PMC, PCMH, CISC

Management of the inbound logistics function is one of the most overlooked areas for significant cost reduction in many organizations. It's time to take a more active role. An effective inbound logistics program can reduce expenses, improve control over receipts, enhance processes and achieve cost savings. Therefore this presentation will make a compelling business case for C-level management's sanctioning and approval for further investigation of this untapped cash goldmine. Effectively managing the inbound flow of product obviously impacts inbound freight costs, but the management of this area also affects inventory control, overall receiving and warehouse productivity, and customer service.

## **Session C — 3:30 p.m. – 5:00 p.m.**

### Track 1

#### **CPSM® Bridge Review Part III**

Patrick (Pat) Woods, CPSM, C.P.M., CPIM

The focus on Module 3 – Leadership in Supply Management will include leadership, risk and compliance and strategic sourcing.

### Track 2

#### **Deadlock Breaking Negotiations - (Three Strategies to move Negotiations beyond Deadlock)**

Mike Babineaux, CPSM, C.P.M., A.P.P.

There are two different views of or approaches to negotiating. One view holds that negotiating is what we do to defend our solutions or positions, prove we are right, and win. The other view of negotiating holds that negotiating is what we do to meet both mutual and differing needs, and create mutual understanding and acceptance so that both sides walk away satisfied. This program explains how to accomplish the second view by leading people who are attached to the first view (wanting to be right and to win) into the second view (wanting to meet the needs of both parties).

### Track 3

#### **How To Tighten Up Your Contracts and Purchase Orders: Part II – Award Process**

Ken Martin, JD

Stan Dubroff, JD

The receipt of bids, proposals, or quotes from suppliers generally commences a flurry of internal and external activity associated with evaluating the bids, quotes, and sources, determining whether and how to conduct negotiations with some or all of the bidders, conducting negotiations, deciding which bidder represents the best price or overall value, and preparing the final contract or purchase order for award – and all of this under some degree of management review and approval. Each step of this process can and does involve legal, contractual, and business principles that can lead to invalid, unenforceable, or deficient contracts and purchase orders – results which can have negative legal, business and personal consequences. This session will focus on the “rules of the road” for forming valid and enforceable contracts and purchase orders, ensuring that a “fair competition” has been conducted, ensuring that the appropriate and desired terms and conditions are included and enforceable, and ensuring that the selected supplier is obligated to perform to all defined and proposed requirements.

## Track 4

### **Strategic Sourcing and Supplier Leadership for Cost Control and Reduction**

Tony Noe, CPSM, C.P.M., A.P.P.

We will walk directly into a deep evaluation of spend analysis and what to do with the results of that study. Next, what is a strategic plan and how to develop one based on the mission/goals you are trying to accomplish. Then we'll explore how to best implement the plan to neutralize most objections and create a successful change atmosphere. Lastly, but most important, we'll determine how to 'judge' the results before moving forward with the plan.

## Track 5

### **Alliance Management (a.k.a. Supplier Relationship Management)**

Bob Engel, C.P.M.

In today's competitive environment, developing strategic alliances with our key supplier partners is more important than ever. Whether we call this very strategic and important activity “Supplier Relationship Management” or any number of other various names, the key issue at stake is very simple: Our supply base holds the keys to many of our undiscovered solutions to our supply management opportunities, and how we deal with our suppliers is a fundamental activity that needs attention and focus.

## **Friday, October 1, 2010**

### **Session D — 8:00 a.m. - 9:30 a.m.**

#### Track 1

#### **CPSM® Bridge Review Part IV**

Patrick (Pat) Woods, CPSM, C.P.M., CPIM

This session will review important test-taking strategies including “trigger words” and “process of elimination” that will provide test-taking information.

#### Track 2

#### **Energy Savings Performance Contracting**

Don Woods, JD, C.P.M.

This workshop takes you through the steps and procedures of having a successful Energy Savings Performance Contract from a professional Buyers point of view. You will learn the pit falls, hazards, and the correct way to be successful from the obtainment of the expert,

# Workshops

determine the benchmarks, preparing the statement of work, writing the request for proposal, evaluating the proposals, contracting with the construction contractor (ESCO), administering the project, getting the financing, measuring the success, closing out the contract, and getting a multiyear written warranty or guaranty that can be enforced. All this and no payments to the contractor until proven success is established.

## Track 3

### **The Power of Confident Communications**

Donna Rynda

How we communicate with others affects how we are perceived. And, for some, that's the bad news. So, the good news is that we are totally in control of that perception! There are actually three categories of communication that impact our interactions with others – and their perceptions of us. We'll discover which one of the three has the greatest impact on our personal contacts, professional colleagues, and customers/clients. What about the characteristics associated with effective communicators? That, too, will be addressed. After all, knowledge is power — and power promotes confidence!

## Track 4

### **Writing an Effective Scope of Work-Level: Basic to Intermediate**

Jim Haining, CPSM, C.P.M., A.P.P.

Developing a clear, concise and effective scope of work is essential to ensure that the supplier(s) understand the requirements of the good/service request. This understanding will lead to superior supplier performance and overall success.

## Track 5

### **Five of the Best Supply Management Practices in Use Today**

Mike Babineaux, CPSM, C.P.M., A.P.P.

Supply management is full of opportunities. By understanding the current supply management best practices, and how various best practices are interrelated, supply management organizations have an opportunity to benchmark their current practices, find out which best practices are missing from their organizations and enhance value to their organization.

## **Session E — 9:45 a.m. - 11:15 a.m.**

### Track 1

#### **CPSM® Bridge Review – C.P.M.'s Ready to Take the Leap to CPSM®**

Patrick (Pat) Woods, CPSM, C.P.M., CPIM

A final review class for preparation for all C.P.M.s ready to take the next step in certification for the CPSM® Bridge Exam.

### Track 2

#### **Value Analysis/Value Engineering: Exercises and Insights for Supply Management Professionals**

Dr. Mike McGinnis, D.B.A., CPSM, C.P.M., A.P.P.

This program will provide blend lecture and in-session exercises to increase the attendee's understanding of value analysis and value engineering. Topics include an overview of value analysis and value engineering, applying techniques of value/engineering

analysis to your own job, and relating value/engineering analysis to sourcing decisions, products, services, and administrative processes.

### Track 3

#### **How To Tighten Up Your Contracts and Purchase Orders: Part III – Post-Award Process**

Ken Martin, JD

Stan Dubroff, JD

Once a contract or purchase order has been awarded to the selected supplier is not the time to relax – now begins the post-award phase of contract administration and ensuring that required goods or services are delivered on time at the contract price. Successfully navigating this phase requires knowledge and skills related to identifying and managing contract change assertions, evaluating the supplier's performance or lack thereof, enforcing the supplier's performance obligations by understanding and using legal, contractual, and business remedies, taking appropriate action to completely or partially terminate or cancel a contract or purchase order, and closing out contracts and purchase orders once performance has been completed and final payment has been made. This session will cover in detail the key legal, contractual, and business principles that govern the post-award process from award through closeout, to include guidance on anticipating and avoiding commonly encountered problems, risks, and pitfalls.

### Track 4

#### **Nexus between Project Management and Supply Management**

Henry F. Garcia, C.P.M., A.P.P.

This presentation depicts the integrated relationship between the project management process and the procurement process. It affords Purchasing and Supply Management (PSM) professionals the opportunity to demonstrate their value to their organizations. Moreover, it creates a basis for cross-functional team participation and leadership on the part of the PSM professional.

### Track 5

#### **The Untapped Inbound Logistics Goldmine: Making the Case for Identifying Opportunities and Cost Savings: Part II**

Tom Tanel C.P.M., CTL, CCA, CISC

Ron Grossman, PMC, PCMH, CISC

Management of the inbound logistics function is one of the most overlooked areas for significant cost reduction in many organizations. It's time to take a more active role. An effective inbound logistics program can reduce expenses, improve control over receipts, enhance processes and achieve cost savings. Therefore this presentation will make a compelling business case for C-level management's sanctioning and approval for further investigation of this untapped cash goldmine. Effectively managing the inbound flow of product obviously impacts inbound freight costs, but the management of this area also affects inventory control, overall receiving and warehouse productivity, and customer service.

# Registration Form

Register By 9/26/2010 (Registrations received after 9/26/2010 will be processed on-site)

64th Annual Southwest SupplyManagement Conference | San Antonio, Texas | September 30 — October 1, 2010

(One Registration Form per Conference Registrant)

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_  CPSM  C.P.M.  A.P.P.  
(As you want it to appear on your name badge) (check if applicable)

Company Name \_\_\_\_\_ Address Type:  Home  Work

Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone Number: \_\_\_\_\_ E-Mail Address: \_\_\_\_\_

Member ID: \_\_\_\_\_ ISM Member  YES  NO  Check here if you do not want your name given to participating suppliers

Market Code: \_\_\_\_\_

## Conference Workshops

### Thursday, September 30, 2010

Opening Session 8:00 a.m. – 10:00 a.m.

Session A 10:15 a.m.-11:45 a.m.

A1  A2  A3  A4  A5

Session B 1:45 p.m.-3:15 p.m.

B1  B2  B3  B4  B5

Session C 3:30 p.m.-5:00 p.m.

C1  C2  C3  C4  C5

### Friday, October 1, 2010

Session D 8:00 a.m.-9:30 a.m.

D1  D2  D3  D4  D5

Session E 9:45 a.m.-11:15 a.m.

E1  E2  E3  E4  E5

**Full Registration:** Thursday and Friday (includes all workshops, Mix-n-Mingle Networking Reception, meals and Supplier Exhibitor Showcase)

ISM Member Registration \$349

Non-ISM Member Registration \$449

Student Registration \$150

**One Day Registration:** Thursday or Friday (includes daily workshops, Supplier Exhibitor Showcase (Thursday only), meals for the day)

ISM Member Registration \$175

Non-ISM Member Registration \$200

Student Registration \$75

## Pre-Conference Workshops — Wednesday, September 29, 2010

\$249 Session A 8:00 a.m.-5:00 p.m.

\$249 Session B 8:00 a.m.-5:00 p.m.

## Guest Meals and Individual Tickets

**Wednesday, September 29, 2010**  \$15 Networking Session 5:30 p.m.-7:00 p.m.

### Thursday, September 30, 2010

\$15 Continental Breakfast 7:00 a.m.-8:00 a.m.

\$35 General Luncheon 12:00 p.m.-1:30 p.m.

\$25 Supplier Exhibit 5:00 p.m.-7:00 p.m.

### Friday, October 1, 2010

\$15 Continental Breakfast 7:00 a.m.-8:00 a.m.

\$35 Closing Luncheon 12:00 p.m.-1:30 p.m.

### Saturday, October 2, 2010 -----

CPSM® Bridge Exam 8:30 a.m.-11:30 a.m.

USD \$180 Member

USD \$265 Nonmember

**Golf Tournament** – Wednesday, September 29 – Use Separate Registration Form  
Register Online at <https://www.ism.ws/education/SWSMCGolfForm.cfm>

**Exhibit Registration** – Thursday, September 30 – Use Separate Registration Form  
Register Online at <http://www.ism.ws/education/SWPCExhibitForm.cfm>

**Register Online at:** <https://www.ism.ws/education/swsmcregform.cfm>

**Mail to:** ISM SWSMC 2010, PO Box 22160, Tempe, AZ 85285-2160

**Fax or E-mail:** (480) 752-7890 E-Mail Address: [msmith@ism.ws](mailto:msmith@ism.ws)

**ISM Contact:** Miranda Smith at [msmith@ism.ws](mailto:msmith@ism.ws) or phone at 800/888-6276 or 480/752-6276

### TOTAL FEES:

Conference Registration Fee \$ \_\_\_\_\_

Pre-Conference Seminar Subtotal \$ \_\_\_\_\_

Guest Meals/Extra Ticket Subtotal \$ \_\_\_\_\_

CPSM® Bridge Exam \$ \_\_\_\_\_

**Total Fees to be Paid: \$ \_\_\_\_\_**

**Method of Payment: (U.S. Funds Only)** Check is enclosed for \$ \_\_\_\_\_ Check Number: \_\_\_\_\_ (Make check payable to: ISM SWSMC)

**Credit Card:**  Am Ex  VISA  MasterCard  Diners Club Credit Card Number: \_\_\_\_\_

Security Code: \_\_\_\_\_ Expiration Date: \_\_\_\_\_ Amount to be charged: \_\_\_\_\_ Tax ID: #13-5265940

Name of Cardholder: \_\_\_\_\_ Cardholder Signature: \_\_\_\_\_

# Conference Registration Information

64th Annual Southwest SupplyManagement Conference ★ Hyatt Regency ★ San Antonio, Texas  
September 30 — October 1, 2010

Please review the following information to avoid delays in processing your registration.

## Pre-Conference Seminar (Wednesday, September 29) includes:

- Seminar A or B
- Continental Breakfast and Lunch
- Networking Mix-n-Mingle

## Two-Day Conference (Thursday and Friday, September 30-October 1) includes:

- Networking Mix-n-Mingle (Wednesday evening)
- Continental Breakfast
- Opening Session with keynote speakers
- 5 Workshop sessions
- 2 Luncheons with keynote speakers
- Morning/afternoon breaks
- Exhibitor Showcase

## One-Day Conference (Thursday or Friday) includes:

- Continental Breakfast
- Opening Session with keynote speakers (Thursday only)
- 3 Workshop sessions (Thursday) or 2 Workshop sessions (Friday)
- 1 Luncheon with keynote speakers
- Morning/Afternoon breaks
- Exhibitor Showcase (Thursday only)

## Continuing Education Hours

A maximum total of 11.5 Continuing Education Hours (CEHs) may be earned by attending five (5) workshops, the opening session, general luncheon, and closing session. A documentation form will be included in the registration packet.

## Guest Meals and Individual Tickets

Individual and extra tickets for the Networking Mix-n-Mingle, luncheons, breakfasts and Exhibitor Showcase are available for purchase. Please refer to the Conference Registration form. There will be a limited number of these available for sale at the registration desk. (Food and beverage guarantees require adherence to posted ticket sales cut-off times. Tickets will not be sold after the cut-off time.)

## Registration Fees

For registration fees, please see the enclosed registration form or go online to <https://www.ism.ws/education/swsmcregform.cfm>.

## How to Register

Please complete all sections of the enclosed registration form and retain a copy for your records. All registrants will receive an e-mail confirmation of receipt of their registration. Registrations received after September 26, 2010 will be processed on site at the conference.

## Fax

Complete the registration form, include payment information and fax to: 480/752-7890.

## Mail

Send completed registration form with payment to: ISM SWSMC 2010, P.O. Box 22160, Tempe, AZ 85285-2160.

## Internet

For online registration, go to <https://www.ism.ws/education/swsmcregform.cfm>. (Non-members must create a new account or log into their existing account to register.)

## On Site

Conference registration will be open Wednesday, September 29 – Thursday, September 30, 2010.

## Payment

ISM accepts Visa, MasterCard, American Express or DinersClub. Please include your billing address and card security code on the form when paying by credit card.

If paying by check, make checks payable to ISM SWSMC and mail to the address on the registration form.

Full payment must be received by the above deadlines. Purchase orders are not recognized as full payment.

## Cancellation and Refund Policy

Notification of your cancellation must be received in writing. Cancellations received up to the day prior to the program are subject to a \$100 cancellation charge. No refunds once the program has begun. Registrants who fail to attend a program are not entitled to a refund. ISM must be contacted within 30 days of the program completion in order for a refund to be considered. ISM reserves the right to substitute instructors. If the program is not held for any reason, ISM's liability is limited to the program fee.

For questions regarding registration, contact Miranda Smith at ISM at 800/888-6276 or 480/752-6276, extension 3020 or e-mail [msmith@ism.ws](mailto:msmith@ism.ws). Visit the ISM Southwest Forum Web site for complete SWSMC information at [www.ismswscf.org](http://www.ismswscf.org).

## Attire

Business Casual – Please be prepared to dress in layers for the hotel temperatures.

Average daytime temperature is: 80°F

Average evening temperature is: 60°F

**Photo Release**

From time to time, photographs of participants may be used in promotional material. By virtue of your attendance, you agree to the use of your likeness in such materials.

**HOTEL INFORMATION**

Hyatt Regency San Antonio  
123 Losoya Street  
San Antonio, Texas 78205-2607  
210/222-1234  
[www.sanantonioregency.hyatt.com](http://www.sanantonioregency.hyatt.com)

**Conference Room Rate**

Single or Double—\$199.00 (plus applicable taxes and other standard charges). This rate is available through September 6, 2010 only.

Conference registration does not include hotel accommodations. Conference attendees are responsible for making their hotel reservations. When making your reservation, inform the hotel that the reservation is for the "Institute for Supply Management."

**Special Needs**

If you have special dietary needs or require any special services or auxiliary aids in accordance with the Americans with Disabilities Act, please contact the hotel.

**Airport and Ground Transportation**

San Antonio International Airport to the Hyatt Regency San Antonio (12 miles) - Take 281 S. which will turn into I-37 S. near the downtown area. Follow I-37 S. and exit Houston Street. Turn right on Houston. Proceed 5 blocks to Broadway. Turn left on Broadway and continue down 3 blocks. Hotel is on the right. (Broadway changes names to Losoya Street).

Hotel does not provide shuttle service from/to San Antonio International Airport.

**Taxi**

\$18 one-way per car. Seating and Luggage: 6 passengers / amount of luggage depends on size of bags. Pick Up: Lower level of the airport.

**Airport Express Airport Shuttle**

\$18 one way. For online reservations, visit: <http://saairportshuttle.hudsonltd.net/res?USERIDENTRY=HYATTRW&LOGON=GO>



## About Our Speakers

**GEORGE ADAMS** George Adams has a unique view of the supply chain and a very diversified background which comes from 30+ years of working successfully in the supply chain. He has strategically worked in all three major aspects of the supply chain (manufacturing, distribution and oil companies). Consequently, he is well versed in the cultures of all three. Adams currently leads the TMK-IPSCO OCTG Sales – Americas team. Prior to his current position at TMK-IPSCO, Adams led the BP Gulf of Mexico Materials Management Team, a partner with Premier Pipe (OCTG Distribution), and Sumitomo Corporation Global Tubular Solutions (International SCM Service Centers).

**F.M. "MIKE" BABINEAUX, CPSM, C.P.M., A.P.P.** was the first Buyer Federal Express hired when it started operations in Memphis. Beginning with the purchasing of aviation parts and supplies and moving on to high-level negotiations for the company's major acquisitions, he has had his hand in most of FedEx purchasing during his career with FedEx Procurement organizations. Babineaux has guest lectured at universities and has been a guest speaker at professional ISM conferences. He was awarded the prestigious Education/Learning Person of the Year for his outstanding achievement and dedicated service to ISM. Babineaux continues to provide FedEx and other organizations with innovative and advanced supply chain management theories and precepts through his own firm, Babineaux Educational Services and Training, Inc.

**MIKE BURGETT, CPSM,** Vice President, Strategic Sourcing, oversees NuStar Energy LP's Sourcing of goods and services. Prior to this assignment, Burgett was Vice President of regional operations for NuStar Energy's domestic terminal group. Prior to the NuStar/Kaneb merger in 2005, he served as Kaneb Pipe Line Company's Vice President of Pipeline Operations, managing petroleum and ammonia pipelines and terminal systems in the US mid-continent. During his 29 years in the pipeline and terminal industry, Burgett has held positions in operations, purchasing, business development & finance with both major integrated oil companies and major merchant terminal companies, including owner/partner in the largest independent terminal company on the US west coast. He has worked in the terminal and pipeline industry throughout the USA as well as in the Pacific Rim and Caribbean. Burgett holds an MBA from Pepperdine University and a BA from National University and is completing his dissertation on Leadership for his doctoral degree in Organizational Management anticipated in late 2010 from Capella University. He and his wife Paula have four grown children, 13 grandchildren & counting, and raise registered Santa Gertrudis cattle from their home in Comfort, Texas.

**QUAVE BURTON, MBA** is Vice President - Procurement Services at Collective Brands Inc. With her deep knowledge in procurement, supply chain and operations, and her enthusiasm for driving both client impact and bottom-line results, Burton leads the development, implementation and alignment of procurement strategies, supplier network capabilities and strengthening online sourcing process to maximize financial resources throughout the procurement process. She earned a bachelor's degree in sociology at Dartmouth College and a MBA at The Fuqua School of Business, Duke University.

**STAN DUBROFF, JD** has an international reputation as a subject matter expert and speaker in Contract Management; Contract Law; Contract Administration, Solicitation, and Subcontract Management; Negotiations; and Contract Writing. With over 40 years of experience, Dubroff offers both an academic and practical perspective through his legal practice, consulting, and teaching activities. He is a Principal and Executive Vice President of CATTAN Services Group, Inc. and is a retired US Government Senior Executive Service engineer and lawyer, having specialized in government contracting and contract administration for over 30 years. Dubroff is a charter member of the Purchasing Management Association of Central Jersey, having served as Professional Development Chairperson and as President and Director of National Affairs. He is a co-author of a two-volume treatise on Trademark Law and Practice and has published numerous articles in the contracting area. His column, "Buy-Laws," on Purchasing and the Law, has appeared regularly in Electronic Buyer's News.

**BOB ENGEL, C.P.M.** was one of the original founders of The Procurement Centre, a company that was acquired by Resources Global Professionals ("Resources") in October 2002, and currently is the Senior Practice Leader for the Resources Supply Chain Management practice. Bob has been a supply chain professional for more than 35 years and has held various leadership positions with large and mid-sized companies that include Shell Oil Company, Marathon Oil Company, and the Coastal Corporation (now El Paso Energy). As a practitioner, his hands-on knowledge and experience with supply chain management provides valuable insight and pragmatic information for Resources' supply chain clients across all industries. Bob not only works with supply chain leaders, but also writes and speaks frequently on supply chain strategies and best practices.

**HENRY F. GARCIA, C.P.M., A.P.P.** is recognized as an expert in purchasing and supply management and contract administration. His knowledge, experience, and expertise has been focused primarily on the implementation of service purchasing and contract administration as well as the development of pricing and negotiation strategies and procedures in public and private sector organizations. Moreover, he is skilled in the application of finance, contracts, economics, and project management to the purchasing and supply management function. He is an experienced university instructor and a veteran trainer in various areas of purchasing and supply management as well as finance- and project management-related subjects. Henry received his BA in Psychology and MA in Economics from St. Mary's University in San Antonio, Texas.

**MARILYN GETTINGER, C.P.M.** is President of New Directions Consulting Group. She customizes training programs and provides consulting services to support organizations through change to meet 21st century demands. Gettinger is an adjunct professor at Bloomfield College, holds a C.P.M., an MBA in Business, and is certified in materials management from Bloomfield College.

**RONALD D. GROSSMAN, PMC, PCMH, CISC** is an Executive Consultant with CATTAN Services Group, Inc. and President and CEO of Argee Logistics LLC, a consulting and training company specializing in logistics and technology issues. He focuses on distribution operations process improvement, cost and spend rationalization, and enhanced resource utilization.

**JIM HAINING, CPSM, C.P.M., A.P.P.** is President of JDH Management, a supply chain management firm and he is employed by Clark County in Las Vegas, Nevada. He presents workshops at the ISM Annual International Supply Management Conference and served on the ISM Affiliate Support Council and the ISM Leadership Training Committee. He received his BS from Brigham Young University and his MBA from the University of Phoenix.

**KENNETH D. MARTIN, JD** has over 35 years of experience as a legal and business manager and advisor regarding all aspects of government and commercial contracts, purchase orders and other business agreements. He is a graduate of the University of Pittsburgh and the Duquesne University School of Law. Martin is an Executive Consultant with CATTAN Services Group, Inc. and received his BS degree from the University of Pittsburgh and his JD degree from the Duquesne University School of Law. Martin achieved practical and substantive acquisition expertise as Vice President, Contracts and Compliance and as Director, Contracts and Counsel for Hamilton Sundstrand Corporation (a subsidiary of United Technologies Corporation) as well as Aerospace Counsel for Sundstrand Corporation, where he provided legal and business advice and support to business operations.

**SHARON McGEE** is President and CEO of R.M. Mechanical, Inc. and is an adjunct professor for TEEX/OSHA and TEEX Center of Leadership Excellence. She is a certified Leadership Trainer for Maximum Impact Speakers.

**MICHAEL A. MCGINNIS, D.B.A., CPSM, C.P.M., A.P.P.** is Associate Professor of Business at Penn State New Kensington. He holds B.S. and M.S. degrees from Michigan State University and a D.B.A. degree from the University of Maryland. McGinnis conducts C.P.M. training, and consults in the areas of purchasing, logistics strategy, negotiations and supply management.

**JAN MILLER** is ISM's Vice President for Affiliate, Group and Forum Support. Her area has principle responsibility for all assistance provided to, organizational training tools provided for, and serving as the primary liaison between affiliates, Groups and Forums. Miller serves as staff contact for the Affiliate, Groups and Forums Relationship Committee, and three Leadership Training Workshop Committees. Miller is responsible for coordinating all aspects of three ISM Leadership Training Workshops annually, including planning training content with each of the Leadership Training Committees. Her responsibilities also include member benefits, corporate relationships and oversight of the *Journal of Supply Chain Management*.

**TONY NOE, B.S., CPSM, C.P.M., A.P.P.** has been involved in procurement since 1971 and manufacturing purchasing since 1979. His work experiences have led to his travel to 20 countries in search of low cost and better quality sources. Noe has served as the chair of ISM's Materials Management Group, authored several articles for ISM's Inside Supply Management™ publication, and is a frequent speaker at many conferences. Noe is married to wife Gayle, and they have two children. His hobbies include photography, and "purchasing" golf – which he explains as "low per stroke per average cost."

**ROBERT A. RUDZKI** is President of Greybeard Advisors LLC, working with companies that are seeking to improve their corporate performance through transforming their supply management practices. He graduated from Lehigh University with a BS in Industrial Engineering, and holds an MBA from The Wharton School. Rudzki is co-author of two best-selling supply management books: *Straight to the Bottom Line*, and *On-Demand Supply Management*.

**DONNA RYNDA's** experience as a Training and Development Specialist has included a variety of management positions for such industries as retail sales, computer technology, grocery distribution, adult education, hospitality and foodservice. Her company's name, "Make it Matter" reflects her personal goal and professional commitment. Rynda's speaking engagements have included conferences and seminars for many state and national organizations. She holds a BA in Journalism Education.

**THOMAS TANEL, C.P.M., CTL, CCA, CISC** holds a Bachelor of Arts from St. John's University and an MBA with concentration in logistics from the Florida Institute of Technology. He has an international reputation as a consultant and seminar leader in supplier relationship management and strategic purchasing.

**DON WOODS, JD, C.P.M.** is the CEO of International Consulting & Contracting, [www.donwoods.com](http://www.donwoods.com), is joint ventured with Celtic Energy, Inc., <http://www.celticenergy.com>, and they have been involved in approximately 90% of all ESPC projects in the State of Nevada. Celtic Energy has active or completed projects in most states in the USA. Woods has more than 28 years experience in state and local government purchasing and contracting.

**PATRICK (PAT) WOODS, CPSM, C.P.M., CPIM** — As founder of SCE (Supply Chain Education), Woods has worked with major corporations such as Alcatel, Boeing, Fujitsu, Halliburton, Ingersoll-Rand, Atlas Copco, Verizon and Pertamina, in the areas of supply chain and materials management, traveling extensively in Asia and the former Soviet Union. He holds a degree in Industrial Management from the University of Alabama, with a minor in Economics.

# Southwest Supply Management Conference

11.5 Hours of Timely Supply Management Education

## Plus Special Conference Networking Events



**Location:**

**The Republic Golf Club**  
4226 SE Military Drive  
San Antonio, TX 78222  
**Phone:** 210/359-0000

**Registration Deadline:**

**Friday, September 24, 2010**

You may register online at <https://www.ism.ws/education/SWSMCGolfForm.cfm>. A registration form is included as an insert to this brochure, which includes information on Sponsorship opportunities.

**Format:** Shotgun start, on-course contests, prizes

**Times:** Registration begins at 10:00 a.m. — Tournament begins at 12:00 noon

**Entry Fee:** \$125 person (includes cart, green fees and lunch)

**Note:** Transportation to the golf course will not be provided.

### Networking Mix-N-Mingle

Wednesday, September 29, 2010

5:30 p.m. - 7:00 p.m.

Join us for a "networking mix-n-mingle!" This is a great opportunity to meet new friends and network with your peers! Be sure to bring your business cards!

Refreshments will be available as you plan for a great conference experience. Come by and get information on things to do and places to go in San Antonio and get information on all the wonderful restaurants and shops to visit in the area — within walking distance!



### EXHIBITOR SHOWCASE

Thursday, September 30, 2010

5:00 p.m - 7:00 p.m.

- Visit Exhibiting Suppliers
- Register for Door Prizes
- Enjoy Meeting New Solution Providers
- Obtain Valuable Information Related to Products and Services

