

Session	Title & Description	Speaker	UPPCC & ISM Approved CEH Credit	Attended ✓
<b>Monday, October 9, 2023</b>				
8:00 - 9:00 am General Session	<p><b>Opening Address: All about San Diego</b>  <b>Description:</b> Tammy worked for the City of San Diego for 26 years and lived there for over 30 years. She will offer a fun and entertaining presentation about San Diego - a bit of its history, fun facts, and a game quiz. This session will show both sides of the city - the one seen by the tourists, and the one seen by procurement!  <b>Keynote Address: Hanging Out In Dive Bars: What Neighborhood Institutions Teach Us About Change</b>  <b>Description:</b> What can Dive Bars, one of America's most enduring institutions, teach us about being resilient and weathering change? A lot more than you might think. In this fast-moving, fun, and informative presentation, filled with behind-the-scenes insider knowledge, we'll look at how Dive Bars have successfully adapted to the changing tides of history while still managing to march to the beat of their own drummer and discover how you can harness that same ingenuity in your operations as well.</p>	Tammy Rimes, MPA, Executive Director, National Cooperative Procurement Partners	1.0	
9:00 - 10:00 am General Session	<p><b>Title: A Highly Involved Management Organization Leads to High Performing Teams</b>  <b>Description:</b> Attendees will learn to articulate the characteristics of "high-involvement managed organizations." Identify the leadership theories most beneficial to developing a high-involvement organization. Describe the characteristics of a high-performance team and the various components that influence team performance. Define lifelong learning and what constitutes a learning organization.</p>	Ellen Goodwin, Founder, Dive Bar of the Month Club	1.0	
1:30 - 2:30 pm Breakout Session 1A	<p><b>Title: And the Crowd Goes Wild: Effective Communication Starts with Considering and Listening to Your Intended Audience</b>  <b>Description:</b> An effective communication is one that is received AND understood. This session will focus on identifying your audience and considering the attitudes and biases that they bring to the interaction. Effective communication is critical to engagement with vendors, advocacy for a "Seat at the Table", better working relationships with peers, and better results/more honest conversations with subordinates. Tools for identifying your own strengths, weaknesses or blind spots and being prepared to actively engage with the audience will be shared.</p>	T. Suzette Moore, NIGP-CPP, CPPO, CPPB, Senior Vice President and Chief Procurement Officer, Washington Metropolitan Area Transit Authority (WMATA)	1.0	
1:30 - 2:30 pm Breakout Session 1B	<p><b>Title: What The H@!! is Procurement</b>  <b>Description:</b> Most professionals who have not been exposed to procurement do not have an understanding on what procurement is. Public procurement is a continual changing landscape that needs to attract college graduates, young professionals and those looking for a career change into its workforce. The profession needs to begin this by defining procurement. Topics: Define public procurement, discuss the importance of the procurement role, identify strategies to attract professionals to the profession, and, display and interpret the current career landscape for procurement.</p>	Tara Acton, CPPB, Director of Procurement and Central Services, Mohave County	1.0	
1:30 - 2:30 pm Breakout Session 1C	<p><b>Title: From reactive to proactive: achieving excellence in procurement by maximizing the value of collaboration</b>  <b>Description:</b> Cooperative purchasing and piggybacking allow public agencies to share contracts and deliver better, faster public services to the public. On its face, cooperative procurement is a core strategy for saving time and money, but the most strategic public entities are leveraging procurement collaboration to transform the perception and role of procurement. During this session, you'll learn how fellow AEP awardees are pushing the boundaries to drive agency-wide and regional efficiencies, improve supplier relationships, and support local and diverse businesses. If you're interested in elevating the role of procurement in your entity and maximizing the value of procurement collaboration for your team, region, or supplier community, this is the session for you!</p>	Maria Roux, CPPB, GCPM, Asst. Chief Procurement Officer – QA Compliance, Georgia Dept. of Transportation	1.0	
1:30 - 2:30 pm Breakout Session 1d	<p><b>Title: Strategies to Manage Change as Procurement Moves to Automation</b>  <b>Description:</b> Managing change can be challenging, especially when it involves implementing new technologies that aim to automate procurement. The presenters will discuss the benefits of procurement automation, different automation initiatives, and effective change management strategies agencies can use as they move toward automation.</p>	Moderator, Mariel Reed, CEO, Pavilion, and Panelists: Maria Agrusa, MBA, CPPO, NIGP-CPP, County Procurement Officer, Orange County, CA; Shawn Willett, CPPO, NIGP-CPP, Deputy Procurement Officer, City of Austin, TX; and, Carrie Mathes, MPA, CFCM, NIGP- CPP, CPPO, C.P.M., CPPB, A.P.P., Procurement Manager, Orange County Government, FL	1.0	
2:45 - 3:45 pm General Session	<p><b>Title: A Procurement Primer on the Impacts of Domestic Preference Requirements and Restrictions on Federal Disaster Grant Funding</b>  <b>Description:</b> Guidance related to domestic preference and restrictions in the disaster recovery grant space is evolving. In working with clients across the nation, we find that questions about surrounding the applicability of the Infrastructure Investment and Jobs Act (IIJA) and Build America Buy American Act (BABA) to federal disaster and resiliency projects at the local government level. Join DRS as we share our experiences in the federal disaster recovery space related to the ever-evolving impacts of domestic preference requirements and restrictions and impacts on local government recovery and resiliency. Topics include: Domestic Preference Requirements and Restrictions – Evolving Guidance, Applicability of Build America Buy America (BABA) and Investment Infrastructure and Jobs Act (IIJA) to federal disaster and resiliency projects, and, supply chain concerns and strategy</p>	April Marzacco, Senior Manager Demand Generation & Partnerships, EqualLevel, Inc., & Sharonda Thompson, Director of Logistical Services, Dougherty County School System	1.0	
4:00 - 5:30 pm Breakout Session 2A	<p><b>Title: A Procurement Primer on the Impacts of Domestic Preference Requirements and Restrictions on Federal Disaster Grant Funding</b>  <b>Description:</b> Guidance related to domestic preference and restrictions in the disaster recovery grant space is evolving. In working with clients across the nation, we find that questions about surrounding the applicability of the Infrastructure Investment and Jobs Act (IIJA) and Build America Buy American Act (BABA) to federal disaster and resiliency projects at the local government level. Join DRS as we share our experiences in the federal disaster recovery space related to the ever-evolving impacts of domestic preference requirements and restrictions and impacts on local government recovery and resiliency. Topics include: Domestic Preference Requirements and Restrictions – Evolving Guidance, Applicability of Build America Buy America (BABA) and Investment Infrastructure and Jobs Act (IIJA) to federal disaster and resiliency projects, and, supply chain concerns and strategy</p>	Dr. Kim Abrego, PT, DPT & Shelley Vineyard, MBA, NIGP- CPP, RTSBA, Disaster Recovery Services	1.5	

Session	Title & Description	Speaker	UPPCC & ISM Approved CEH Credit	Attended ✓
4:00 - 5:30 pm Breakout Session 2B	<p><b>Title: <i>Your AEP Award is not a Doorstop: Sharing the Real Value You Bring to Your Organization</i></b>  <b>Description:</b> Congratulations on obtaining NPI's AEP award. To public procurement professionals, it a major achievement based on the criteria you've worked on, or maintained, in order to be determined worthy to receive the award. For those outside of our profession, it's an interesting looking trophy that looks good on your counter, case or desk or may be useful as a doorstop. How can you share the value you, and your office, brings to your entity? You can use the criteria from the AEP application in order to obtain (or maintain) a "seat at the table" in a strategic role in decision making instead of a reactionary position we're often placed in outside of your control. When approaching our colleagues and stakeholders from a place of knowledge, we can become strategic partners, transitioning our appearance from being paper pushers to advocates and educators of the procurement function. Whether you're just starting to pursue becoming an effective communicator or seeking new tips on how to hit the next level of your career, join us for this interactive, lecture-led session and learn how you can enhance your skills, target your message, and promote stakeholder collaboration to inspire impactful partnership.</p>	Victor Leamer, CPPB, Senior Buyer, Spokane County, Washington	1.5	
4:00 - 5:30 pm Breakout Session 2C	<p><b>Title: <i>Getting Started: Taking a Strategic Program Approach to Sustainable Procurement</i></b>  <b>Description:</b> This session will support the development of a strategic approach to sustainable procurement through interactive learning, discussion, and strategy development exercises. Participants will develop an inventory of existing organizational activities, goals, and priorities, to ensure program alignment and synergies, then prioritize and select a set of key goals and associated metrics to deliver outcomes that are impactful, aligned with organizational priorities, and focused on ongoing program development. We'll also introduce SPLC's Strategy Cycle process, to support you in further development of diverse yet complementary strategies to meet the specific program and category goals you identify.</p>	Johanna Anderson, Director of Learning and Member Engagement, Sustainable Purchasing Leadership Council	1.5	
<b>Tuesday, October 10, 2023</b>				
8:00 - 9:00 am General Session	<p><b>Title: <i>AI in Public Procurement</i></b>  <b>Description:</b> What is AI and how is it currently being used? Challenges and concerns with AI, Moving forward with AI, and available resources for the public procurement professional.</p>	Zachary Christensen and Lee Ann Pope, NASPO ValuePoint	1.0	
9:15 - 10:15 am General Session	<p><b>Title: <i>Can You Relate? Expanding Your Sphere of Influence</i></b>  <b>Description:</b> This workshop focuses on the progression of procurement operations elevating themselves as strategic partners, ensuring them a seat at the table, through relationship building and intentional communication strategies. Relationships matter. As the procurement profession evolves, establishing the procurement operation as a strategic partner has become not only desirable, but essential. Elevating into that role begins from within, requiring intention and a strong communication plan. This session will explore opportunities to develop and strengthen both internal and external relationships, all of which contribute to strategic transformation.</p>	Carrie Mathes, MPA, CFCM, NIGP-CPP, CPPO, C.P.M., CPPB, A.P.P., Manager, Orange County Procurement Division	1.0	
10:30 am - Noon Breakout Session 3A	<p><b>Title: <i>2023 DOJ Antitrust Division / Procurement Collusion Strike Force Update</i></b>  <b>Description:</b> The presentation will cover procurement collusion and related crimes and the DOJ's Procurement Collusion Strike Force, including strategies for identifying and preventing collusion, and updates on DOJ's current enforcement trends. Following up on the popular session at the 2022 conference, this presentation will include new case studies and additional information regarding the last year of enforcement.</p>	Zac Trotter, Trial Attorney, Department of Justice - Antitrust Div.	1.5	
10:30 am - Noon Breakout Session 3B	<p><b>Title: <i>A Federal Procurement Whodunit: Follow the Clues to Optimize Federal Disaster Funding</i></b>  <b>Description:</b> The top five reasons for federal disaster funding ineligibility and clawbacks are all procurement related. With the abundance of federal disaster grant funding available to public entities, procurement professionals are faced with implementing and applying unfamiliar procurement requirements to optimize funding. Federal awarding agency audits continue to highlight numerous procurement and contracting missteps regarding Uniform Guidance (UG) compliance. Join DRS as we walk through an interactive "whodunit" to identify the "culprits" and their missteps that lead to the de-optimization of federal disaster grant funding. Topics include: Importance of communicating the federal procurement and contracting rules to all on the local government recovery team, Identifying actions along the procurement process that can lead to ineligibility or clawback of funding during audit, and developing proper documentation support and procurement narratives to lead federal granting agency reviewers and auditors to the right conclusion for funding eligibility and compliance.</p>	Dr. Kim Abrego, PT, DPT & Shelley Vineyard, MBA, NIGP- CPP, RTSBA, Disaster Recovery Services	1.5	
10:30 am - Noon Breakout Session 3C	<p><b>Title: <i>You want what? - Your RFP is a road map</i></b>  <b>Description:</b> This session is about how the Request for Proposals (RFP) document is a road map for suppliers and, based on how it's drafted, can lead to a successful journey or a wreck. The RFP Dream Team will present some strategies on how to enhance RFP documents to be more user friendly, become an entity of choice and also improve the chances vendors add the entities' RFP to their "yes" pile, improving response rates and attracting high performing suppliers. We will provide some concrete examples and also analyze participant's templates for improvements and enhancements. Items covered are: structure of RFP, various sections, their purpose, disclosure of information, clarity of content provided, importance of flexibility, use of plain language, pitfalls and simple strategies for implementation. (Not all entities have flexibility to make changes to templates easily.) We will also discuss the positive impacts on smaller, less sophisticated local vendors on their ability to respond to RFPs.</p>	Stephanie Dion, Procurement Manager, Canoe Procurement Group & Victor Leamer, CPPB, Senior Buyer, Spokane County, Washington	1.5	

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1:30 - 2:30 pm Breakout Session 4A	<p><b>Title: <i>Beat the Audit: Using procurement and contract technology to ensure compliance and deliver results</i></b>  <b>Description:</b> Just because data is available doesn't mean it's easy to gather, especially in a useful format. The best way to beat an audit is by maximizing your data collection and management systems to ensure your supplier data, including quotes, certifications, and amendments are organized and readily available. A comprehensive database allows you to easily find what your company purchases, including from which supplier, how much, and when. The session will be an open forum to discuss current and past successes, along with some failures, to beat the audit. Examples of how digitizing contract management and procurement processes can increase efficiency, reduce operating costs and enhance the overall audit efficiency and performance.</p>	Kim Cullen, Director of Marketing, mdf commerce	1.0	
1:30 - 2:30 pm Breakout Session 4B	<p><b>Title: <i>Engagement of Internal and External Stakeholders for Excellence in Procurement</i></b>  <b>Description:</b> The session will focus on how to engage internal and external stakeholders to improve overall communications and provide effective procurement solutions. Every organization has demanding internal and external stakeholders. We are each charged to procure goods, services, and in some organizations, providing construction services. How we engage with one another can prove to be the best tool we have to meet our work demands and how we effectively deliver. This session is geared towards engaging in a dialogue between attendees on what solutions they have found to be effective.</p>	Dean Mealy, II NIGP-CPP, CPPO, Procurement and Contract Manager, Town of Palm Beach Florida	1.0	
1:30 - 2:30 pm Breakout Session 4C	<p><b>Title: <i>How to Attract, Develop, and Retain the Next Generation of Procurement Leaders</i></b>  <b>Description:</b> Presenters Victoria Cortinas and Nathan Daou will draw upon their combined 47 years of public procurement experience to explore strategies for attracting good applicants, developing them into the procurement leaders of tomorrow, and hopefully retaining them along the way. In this interactive session, presenters and participants will share their successes and struggles in this ever-changing area, and all should walk away with ideas to employ within their agency.</p>	Nathan Daou, NIGP-CPP, CPPB, CPPO, C.P.M., A.P.P., Procurement Administrator, City of Tucson & Victoria Cortinas, CPPB, CPPO, NIGP- CPP, C.P.M., Senior Procurement Specialist, Tucson Electric Power Company	1.0	
2:45 - 3:45 pm General Session	<p><b>Title: <i>Mastering the Art of Negotiation: Strategies for Achieving Mutually Beneficial Contract Agreements</i></b>  <b>Description:</b> Negotiation is an art; it is about getting the best possible outcome in the best possible way. Contract negotiation is an involved process, requiring unique skills, knowledge, and experience. In this session, we'll dig into the complexity of contract negotiation and showcase how effective planning and preparation can lead to win-win solutions. Drawing on real-life examples from public agencies, we'll explore proven tips and tricks to help you achieve your desired outcomes and build your confidence as a skilled negotiator in public procurement.</p>	Dan Marran, CPPO, C.P.M., NIGP-CPP, Sourcewell	1.0	
4:00 - 5:00 pm Breakout Session 5A	<p><b>Title: <i>The Procurement Professional's Role in CyberSecurity</i></b>  <b>Description:</b> Sometimes the Winds of Change bring threats to public organizations and procurement can play a significant role in mitigating the risks associated with these threats. This presentation will concentrate on how procurement professionals can find and use the resources available to them to add value to procurements and help protect the confidentiality, availability and integrity of government data. Topics: What is Procurement's role in cyber security for the organization? What are the current threats facing government? What resources are available to procurement professionals? StateRAMP Resources: Sample Language; SME Assistance; Access to assessment documents and artifacts; and, Center for Digital Government – Best Practice Guide</p>	Rebecca Kee, NIGP-CPP, CPPO, CPPB, CJE Implementation Consultant, StateRAMP	1.0	
4:00 - 5:00 pm Breakout Session 5B	<p><b>Title: <i>Follow The Yellow Brick Road to Policy and Compliance</i></b>  <b>Description:</b> Session topics: Translating regulation to policy, developing a policy manual, identifying procurement risk, and developing a procurement compliance program.</p>	Maria Roux, CPPB, GCPM, Asst. Chief Procurement Officer – QA Compliance, & Mary Zirock, CPPB, GCPA, Asst. Chief Procurement Officer - Operations, Georgia Dept. of Transportation	1.0	
4:00 - 5:00 pm Breakout Session 5C	<p><b>Title: <i>Empowering Efficiency: AI in State and Local Government Procurement</i></b>  <b>Description:</b> Explore the transformative impact of artificial intelligence (AI) in state and local government procurement. In this not-to-be-missed session, we will examine the ways AI technologies are revolutionizing the efficiency, transparency, and cost effectiveness of procurement operations. Outcomes: gain insight into real-world AI applications that are reshaping the landscape of public sector procurement; discover how AI-driven capabilities are fostering better decision-making; and, learn how AI is driving positive outcomes for citizens and taxpayers alike.</p>	Ben Allen, VP, Public Sector Solutions & Sara Fixel, Director, State and Local Solutions, Appian	1.0	

Wednesday, October 11, 2023

Session	Title & Description	Speaker	UPPCC & ISM Approved CEH Credit	Attended ✓
9:00 - 10:00 am General Session	<p><b>Title: Novel Procurement Pathway to Support Blue Economy Innovation at the San Diego Port</b>  <b>Description:</b> Ports are at the forefront of the environmental challenges associated with climate change and sustainable coastal development. To adapt and promote a transition to a sustainable ocean economy (Blue Economy), ports require innovative technologies and novel business models beyond the traditional maritime economy standards. In this context, in 2016, the Port of San Diego launched a novel Blue Economy Incubator (BEI) Program seeking innovative aquaculture and blue technology proposals to address Port environmental challenges and inform future Blue Economy opportunities.</p> <p>The BEI is acting as a launching pad to early-stage companies by providing key assets and support services focused on pilot project facilitation. As the state-legislated trustee of tidelands and submerged waters in and around San Diego Bay, developing sustainable domestic aquaculture and supporting Port-related blue technology assists in fulfilling the Port's public trust responsibility to promote fisheries and commerce, as well as aligning with its mission to enhance and protect the environment. This presentation will highlight how the BEI program provides a new procurement pathway for the Port to attract, evaluate and ultimately support innovative pilot projects in support of its mission and public trust responsibility.</p>	Matthew Earle, Chief Procurement Officer, Procurement Services, Port of San Diego	1.0	
10:15 - 11:15 am Breakout Session 6A	<p><b>Title: Procurement from the "Program" Perspective - The Real Reason We Do What We Do</b>  <b>Description:</b> A great number of procurement professionals work on the administrative side of their organization. Meaning their first line "customers" are the user departments. The administrative offices focus on protecting their organization by adhering to government procurement laws and statutes. As well as they should; however, the administrative offices may not have a "holistic" view of how the department purchases affect communities. In this session, the administrator will learn a</p>	Shannon Pleasant, MPA, CTCD, Division Manager – DPU, Purchasing Director's Office, Houston Health Department	1.0	
10:15 - 11:15 am Breakout Session 6B	<p><b>Title: 2023 State of Public Sourcing: Procurement's World of Tomorrow</b>  <b>Description:</b> Through this session on the "State of Public Sourcing", attendees will gain insights into current trends, new challenges, and actionable insights for public procurement professionals</p>	Cindy Whitaker, Euna Solutions	1.0	
10:15 - 11:15 am Breakout Session 6C	<p><b>Title: Avoid Construction Project Pitfalls when using Public Funds</b>  <b>Description:</b> Many seasoned procurement professionals are familiar with the ABC's (advertising, bidding and contracting) of construction when using public funds. However, there is still room for error even at the foundational level of procuring construction contracts. This fact can be witnessed by reading the headlines in local newspapers and listening to taxpayers' cries of fraud, waste and abuse of their hard-earned dollars. Therefore, this session is designed to identify 20 common construction project pitfalls and discuss best practices to ensure publicly funded entities do not become topics of the nightly news.</p>	Dr. Edna Johnson, Assistant Director of Procurement Services & Dr. Jesus Amezcuca, Assistant Superintendent for Business Services, Harris County Department of Education	1.0	
1:00 - 2:00 pm Breakout Session 7A	<p><b>Title: What would you do? Consequences of Procurement without ethics</b>  <b>Description:</b> What is Ethics and Ethical Behavior, Vendor Lunches and "Free" Gifts – Appropriate when???, Examples of Unethical Behavior in Government, Interactive GAME – What would you do? – real life situations Procurement Professional find themselves in</p>	Lisa Mehalko, NIGP-CPP, CPPO, CPSM, GCPM, GCPCA, CIA, Director of Procurement, Georgia Technology Authority	1.0	
1:00 - 2:00 pm Breakout Session 7B	<p><b>Title: Influencing Others to Embrace Change</b>  <b>Description:</b> The presenter has over 30 years of experience in training and development, financial management, operational audit and management consulting. He will share tactics and strategies for influencing others in the face of change.</p>	Derrick Strand, Executive Director, UPPCC	1.0	
1:00 - 2:00 pm Breakout Session 7C	<p><b>Title: How did your agency build an internal gold standard for cooperative purchasing?</b>  <b>Description:</b> A deep dive and interactive discussion around changes, innovations, best practices and operating procedures being deployed to get the most out of cooperative purchasing resources in the market today.</p>	David Kidd, Program Manager, GovMVMTC Cooperative	1.0	

Session	Title & Description	Speaker	UPPCC & ISM Approved CEH Credit	Attended ✓
2:15 - 3:45 pm General Session	<p><b>Title: <i>Smart eProcurement guided by insights from aggregate spend data, benchmarks, trends, dashboards, and Pareto analysis</i></b></p> <p><b>Description:</b> In this presentation we show step by step with examples and case studies a strategic purchasing and supply management initiative with an intelligent spend analytics system. Smart eProcurement guided by insights from aggregate spend data, benchmarks, trends, dashboards, and Pareto analysis can provide an incredible result for procurement processes. Benchmarks of spend data over time, between different departments, and different Public Agencies provide interesting insights. Trends, dashboards, and anomalies detect incredible insights that can feed into eProcurement systems resulting in optimal procurement. Pareto analysis is a formal technique useful in scenarios where the problem-solver estimates the benefit delivered by each action, then selects a number of most effective actions that deliver a total benefit reasonably close to the maximal possible one. This technique helps identify the top portion of causes that need to be addressed to resolve the majority of problems. The concept is to identify significant few from trivial many. While it is common to refer to Pareto as "80/20" rule, under the assumption that, in all situations, 20% of causes determine 80% of problems, this ratio may not be true in all situations. Flexible Pareto analysis allows user to change the significant few percentage and not use 20% all the time. In this presentation we discuss how Pareto analysis helps in accessing public procurement insights from aggregate spend data. These insights allows practitioners to focus into a significant few eProcurement transactions and solicitations that produce huge difference. We use real world examples and case studies from different public agencies across the country to demonstrate how insights from spend data can produce improved eProcurement solicitations, processes, and transactions.</p>	Sheema Mirchandani, Educator and Researcher & Sam Adhikari, Manager, Developer, and Researcher	1.5	
<b>Total Requested CEH</b>			<b>Maximum = 16.5 CEH</b>	