



**institute for
supply management**

ISM—New York, Inc.

Professional Development Catalog

September 2009 - June 2010

Public Seminars

On - Site Seminars

Satellite Seminars

Certification Programs

Annual Symposium

Annual Conference

ABOUT ISM-NEW YORK

Founded in 1913, the Institute for Supply Management-New York, Inc. (formerly, National Association of Purchasing Management-New York) is a not-for-profit educational institution working for the benefit of purchasing and supply management professionals.

When you join ISM-New York as a regular member, you automatically become a member of the international organization and receive *Inside Supply Management* magazine and access to the Members Only portion of the ISM website. Membership in ISM opens lines of communication to over 40,000 other procurement professionals in business, industry and government.

The primary objective of ISM-New York is the promotion of the profession and the expansion of professional skills and knowledge. Continuing the tradition established in October 1917, when we offered our first purchasing seminar, ISM-New York offers public and on-site educational programs tailored to your position level. As you will find in this Catalog, ISM-New York offers programs designed to teach core competencies ranging from Fundamentals of Purchasing Management, Negotiations and Cost-Price Analysis to seminars in formerly non-traditional areas, such as Facilities Management, Human Capital Services Procurement Strategies and Buying Travel Related Services. This year, we have scheduled seminars in Marketing and Advertising Sourcing Strategies and Global Trade - Best Practices in Managing Compliance and Risk. We offer CPSM Review seminars to assist you in preparing for and satisfying the requirements for the coveted Certified Professional in Supply Management (CPSM) designation.

Additionally, ISM-New York holds an Annual Supply Management Symposium and an Annual Conference covering leading edge topics and strategic issues.

Also offered are dinner and breakfast meetings featuring purchasing presentations, Sourcing Group meetings in major commodity and services areas and committee meetings on Green and Supplier Diversity initiatives.

Take advantage of ISM-New York's valuable educational opportunities to enhance your knowledge, skills and contribution to your organization.

STATEMENT OF ANTITRUST POLICY

It is the express policy and intention of ISM and ISM-New York to comply at all times with all existing and future laws, and in furtherance of this policy, no activity or program will be sponsored or conducted by or within ISM or ISM-New York which in any manner whatsoever will represent or be deemed a violation of any existing or future law, including the antitrust laws. The following will be consciously avoided at all ISM and ISM-New York meetings: (a) Pricing procedures and discounts offered by particular suppliers, (b) Standardizing or stabilizing prices, (c) Credit terms offered by particular suppliers, (d) Standard terms and conditions of sales, and (e) Boycotts of suppliers due to pricing or marketing practices.

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ISM-New York is not responsible for statements or opinions expressed by speakers at its public and on-site programs. The views expressed are solely those of the speakers and not necessarily endorsed by ISM-New York.

PRESIDENT'S MESSAGE



I am happy to present the inaugural ISM-New York Professional Development Catalog. We are excited about the name change to ISM-New York which emphasizes the global and strategic nature of our profession that will appeal to a broader spectrum of supply chain personnel. I am confident that the programs offered will enable our members to be better equipped to meet the challenges ahead in the field of supply chain management. Our instructors are all subject matter experts with many years of practical hands on experience. Two new courses have been added, "Global Trade-Best Practices in Managing Compliance and Risk" and "Marketing and Advertising Sourcing Strategies."

The Board of Directors is focused on providing the best programs to address our members' needs throughout the year with a new meeting format which includes two breakfast meetings and an upcoming redesigned website. You will also hear from the leading practitioners in supply chain management who will share their best practices at our Symposium on November 12 and our Annual Conference on March 26. All of our programs are available for on-site presentation and can be customized to meet your specific educational needs.

I am truly interested in what you have to say, so please continue to let us know how we can best serve you. Plug in and get involved with the many opportunities available to you from one of the largest ISM affiliates in the country.


 Joe Robertson

ISM-NY 2009-2010 OFFICERS, DIRECTORS and COMMITTEE CHAIRS

BOARD OF DIRECTORS

| | | | |
|-----------------------------------|---------------------------|------------------------------------|---------------|
| President | Joseph Robertson, C.P.M. | joseph.robertson@morganstanley.com | (212)537-1116 |
| First Vice President | Stephen Fischer, C.P.M. | stephen_fischer@colpal.com | (212)310-2570 |
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| Treasurer | Dennis Garcia | dennis.garcia@skadden.com | (212)735-3895 |
| Director for National Affairs | Joseph H. Rosenthal | wsspjoseph@aol.com | (917)449-2777 |
| Director of Membership | Wendy Lamont, C.P.M. | wendy.lamont@us.ibm.com | (877)202-9323 |
| Executive Director | Peter Oppenheimer, C.P.M. | poppenheimer@ismny.org | (516)466-9822 |
| <u>Sourcing Group Directors:</u> | | | |
| Consumer Related Goods & Svces. | Mash Ahmadieh | mashaal.ahmadieh@pfizer.com | (212)733-1272 |
| Facilities Management | Laura Grana, C.P.M. | laura.grana@morganstanley.com | (212)537-2093 |
| Marketing, Travel & H.R. | William Hatzichristos | whatz@nymets.com | (718)803-4099 |
| Professional & Outsourcing Svces. | Keith Hines | keith.e.hines@us.pwc.com | (646)471-2171 |
| Technology & Telecommunications | James Martin | jamesemartin@yahoo.com | (646)205-0205 |

COMMITTEE CHAIRS

| | | | |
|------------------------------|---------------------------|-----------------------------------|---------------|
| Professional Development | Peter Oppenheimer, C.P.M. | poppenheimer@ismny.org | (516)466-9822 |
| Business Survey Chair | Jonathan Basile | jonathan.basile@credit-suisse.com | (212)538-1436 |
| Business Survey Co-Chair | John Popolizio, C.P.M. | john.popolizio@ubs.com | (201)352-2952 |
| Supplier Diversity Co-Chairs | Carl Hessick | hessick@pbworld.com | (212)465-5498 |
| | William Drewes, J.D. | poiboinyc@earthlink.net | (212)228-0402 |
| Green Committee Chair | Debbie Jaslow Shatz, CFM | dshatz@bloomberg.net | (212)617-3898 |



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Tel. (516)466-9822 Fax (516)466-4141
www.ismny.org

Executive Director: Peter Oppenheimer, C.P.M.
poppenheimer@ismny.org



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P.O. Box 22160
 Tempe, AZ 85285-2160

Tel. (800)888-6276 Fax (480)752-7890
www.ism.ws

Center for Advanced Purchasing Studies (CAPS)
 Tel. (480)752-2277
www.capsresearch.org

Learn and earn CPSM/C.P.M./A.P.P. credit hours by attending seminars, forums and dinner programs

2009 - 2010 CALENDAR OF EVENTS

DATE

PROGRAMS, SEMINARS AND FACULTY

2009

September 22

October 8
October 15
October 19

October 20

October 22
October 27 & 28

November 12

November 17

November 19
December 8

NEW

ISM-New York Dinner Meeting

Project Management Skills for Sourcing Professionals
CPSM Exam One Review
Contract Law - Legal Aspects of Purchasing

ISM-New York Dinner Meeting

Satellite Sem.— Defining/Applying Eco. & Fin. Concepts
CPSM Bridge Exam Review

17th Annual ISM-NY Supply Management Symposium

ISM-New York Breakfast Meeting

Global Trade - Managing Compliance and Risk
Inventory Management in the Supply Chain

New York Hilton Hotel

William Hooker, C.P.M.
Sal Vitale, C.P.M.
Martin Carrara, J.D., C.P.M.

New York Hilton Hotel

Televised Panel Discussion
Carla Lallatin, C.P.M., CPPO

Five Speakers - New York Hilton

New York Hilton Hotel

Thomas Cook
Norm Heilweil, CPIM

2010

January 19

January 21
January 28
February 4
February 8

February 9

February 11
February 25
March 2-4
March 11

NEW

March 18

March 26

April 8

April 20

April 22

April 22

April 25-28

May 6

May 13

May 25

June 3

June 7

June 15 & 16

ISM-New York Dinner Meeting

Print Buying Essentials
Cost-Price Analysis and Total Cost Concepts
Human Capital Services Procurement Strategies
CPSM Exam Two Review

ISM-New York Dinner Meeting

Satellite Seminar – Talent and Career Management
Purchasing of Services
Fundamentals of Purchasing Management
Purchasing Negotiations

Marketing and Advertising Sourcing Strategies

27th Annual ISM - New York Conference

Buying Travel Related Services - Strategies for Savings

ISM-New York Breakfast Meeting

Supplier Diversity - A Purchasing Perspective
Satellite Seminar – Logistics, Inventory and Distribution
95th ISM International Purchasing Conference
Legal Aspects of Technology & Software Acquisitions
Facilities Management & Construction Services Sourcing

ISM-New York Dinner Meeting

Supplier Relations, Ethics and Social Responsibility
CPSM Exam Three Review
CPSM Bridge Exam Review

New York Hilton Hotel

Don Carli
William Heaton
Bob Cope
Carla Lallatin, C.P.M., CPPO

New York Hilton Hotel

Televised Panel Discussion
Carla Lallatin, C.P.M., CPPO
Abate Kassa, C.P.M.
Rosary Immordino, C.P.M.

Joanne Davis

Five Speakers - New York Hilton

Howard Z. Brooks

New York Hilton Hotel

I. Javette Hines, J.D. and Keith Hines
Televised Panel Discussion
San Diego, CA
Martin Carrara, J.D., C.P.M.
Brian Kreiger

New York Hilton Hotel

Carla Lallatin, C.P.M., CPPO
Sal Vitale, C.P.M.
Carla Lallatin, C.P.M., CPPO

SEMINAR TRAINING CENTER:

ISM-New York seminars are held at the Pfizer Corporate Training Center, 150 East 42nd Street, bet. Lexington and Third Avenues, from 9:00 A.M. to 5:00 P.M. Monthly Meetings, the Symposium and the Conference are at the New York Hilton, 1335 Avenue of the Americas at 53rd Street.

SATELLITE SEMINARS

Institute for Supply Management (ISM) Satellite Seminars are shown at the City of New York Citywide Training Center, 2 Washington Street, Room 1980, New York City.

ON-SITE SEMINARS

ISM-New York's public seminars are also available for on-site presentation. These and other seminars can be custom designed for your company's training requirements. To discuss on-site seminars, please contact Peter Oppenheimer at (516) 466-9822.

To register call (516) 466-9822 or use the form on the next to last page of this Catalog.

17th Annual ISM-New York Supply Management Symposium

November 12, 2009, New York Hilton Hotel, 8:30 A.M.- 4:00 P.M.

Hear Leading Speakers Discuss Timely Purchasing Topics

- ◆ **Collaboration With Suppliers In Distressed Times**
By Javara Perrilliat, Principal, A.T. Kearney
- ◆ **Reduce, Reuse, Recycle: How To Achieve Sustainability In Your Supply Chain**
By Dr. Kevin Lyons, Chief Procurement Officer / Executive Director, Purchasing Department
Research Professor, Supply Chain Environmental Archeology, Rutgers University
- ◆ **Going To Market In Turbulent Times**
By Stephen V. Fischer, C.P.M., Director, Procurement Strategy, Global Procurement
Colgate-Palmolive Company
- ◆ **An Evolving Global Services Journey**
By James Jamieson, Director - Sourcing & Procurement Solutions, Allstate Insurance Company
- ◆ **Supplier Bankruptcy: How To Manage Risk**
By Chipman L. Flowers, Jr., Esq., President & Managing Member of The Flowers Counsel Group, LLC

≈ The Symposium will Feature a Speaker Panel Discussion ≈

PCAT

REGISTRATION INFORMATION

TO REGISTER: Registration must be in advance, and may be made up to the time of the Symposium, subject to confirmation.

REGISTRATION FEE: Indicate method of payment below. Make checks payable to ISM-New York.

| | Member | Non-Member | TEAM RATES - 3+ Members and/or Non-Members from the same organization |
|---|--------|------------|--|
| EARLY BIRD - Postmarked Before Oct. 16, 2009 | \$495 | \$595 | \$475/person |
| Postmarked After Oct. 16, 2009 | \$565 | \$675 | \$515/person |

NON-MEMBERS of ISM-New York but members of other ISM affiliates or APICS are welcome to attend ISM-New York educational programs at member rates.

CONFIRMATION: Confirmations will be e-mailed to registrants approximately one week prior to the Symposium.

CANCELLATIONS & REFUNDS: Confirmed registrations may be cancelled and tuition refunded, less a \$100 administrative fee, if cancellations are received no later than seven days prior to the date of the Symposium. Registrants who have been confirmed (and not cancelled on time) but are unable to attend this meeting are liable for the entire fee. Substitutions may be made at any time.

HOTEL ACCOMMODATIONS: ISM-New York does not arrange hotel accommodations. Registrants who wish to stay at the conference site may reach the Hilton at (212) 586-7000.

REGISTRATION FORM

Peter Oppenheimer, C.P.M.
ISM-New York, Inc
69 Susquehanna Avenue
Great Neck, NY 11021-3819

Please photocopy this form for additional registrations
For faster registration:
Phone (516) 466-9822 or Fax (516) 466-4141
E-mail: poppenheimer@ismny.org

Please register me for the 17th Annual Symposium to be held at the New York Hilton on Thursday, November 12, 2009.

Name (Please print) _____ Position _____

Company _____ Phone () _____

Address _____ Fax () _____

City _____ State _____ Zip _____ E-Mail (Print) _____

___ Member ___ Non-member ___ Send membership information ISM-NY Fed ID# 13-5329820

METHOD OF PAYMENT: P.O.# _____ Personal/Company check is enclosed \$ _____

___ VISA ___ MasterCard Card # _____ Expiration Date _____

___ AMEX Amount to be charged: \$ _____ Cardholder's Signature _____

Twenty-Seventh Annual ISM-New York Conference

March 26, 2010, New York Hilton Hotel, 9:00 A.M.- 4:30 P.M.

**Hear Five Leading Speakers Discuss Timely Purchasing Topics
Plus Special Educational Exhibits and a Mayoral Proclamation Declaring
March 2010 Supply Management Month in New York City**

- ◆ **Navigating the “New Normal”: Global Sourcing in Today’s Economy**
By Dan Braga, Partner, Supply Management Practice, **McKinsey & Company**
- ◆ **Linking Organizations and Creating Synergy: Accelerate Bottom-Line Benefits**
By Jaime M. Bohnke, Vice President Supply Chain, Tyco International
Tyco International - Winner of *Purchasing* magazine’s Medal of Professional Excellence for 2009
- ◆ **Tools for Effectively Managing Marketing and Advertising Services**
By Sal Vitale, C.P.M., Procurement Director, Marketing and Advertising, **American Express**
- ◆ **Sustainability at Raytheon - How You Can Grow Your Business and Reduce Your Footprint**
By David R. Chamberlain, P.E., C.E.M., G.B.E., Principal Energy Engineer, **Raytheon**
- ◆ **The “No Excuses” Supply Chain: Remove Barriers, Improve Operations, Save Money**
By Gary A. Smith, CPIM, CSCP, Director, Supply Chain Operations , **New York City Housing Authority**

≈ The Conference will Feature a Speaker Panel Discussion ≈

CAT

REGISTRATION INFORMATION

TO REGISTER: Registration must be in advance, and may be made up to the time of the Conference, subject to confirmation.

REGISTRATION FEE: Indicate method of payment below. Make checks payable to ISM-New York.

| | Member | Non-Member | TEAM RATES - 2+ Members and/or Non-Members from the same organization |
|---|--------|------------|--|
| EARLY BIRD - Postmarked Before March 5, 2010 | \$350 | \$395 | \$325/person |
| Postmarked After March 5, 2010 | \$395 | \$495 | \$350/person |

NON-MEMBERS of ISM-New York but members of other ISM affiliates or APICS are welcome to attend ISM-New York educational programs at member rates.

CONFIRMATION: Confirmations will be e-mailed to registrants approximately one week prior to the Conference

CANCELLATIONS & REFUNDS: Confirmed registrations may be cancelled and tuition refunded, less a \$100 administrative fee, if cancellations are received no later than seven days prior to the date of the Symposium. Registrants who have been confirmed (and not cancelled on time) but are unable to attend this meeting are liable for the entire fee. Substitutions may be made at any time.

HOTEL ACCOMMODATIONS: ISM-New York does not arrange hotel accommodations. Registrants who wish to stay at the conference site may reach the Hilton at (212) 586-7000.

REGISTRATION FORM

Peter Oppenheimer, C.P.M.
ISM-New York, Inc
69 Susquehanna Avenue
Great Neck, NY 11021-3819

Please photocopy this form for additional registrations
For faster registration:
Phone (516) 466-9822 or Fax (516) 466-4141
E-mail: poppenheimer@ismny.org

Please register me for the 27th Annual ISM-NY Conference to be held at the New York Hilton on Friday, March 26, 2010.

Name (Please print) _____ Position _____
Company _____ Phone () _____
Address _____ Fax () _____
City _____ State _____ Zip _____ E-Mail (Print) _____

Member Non-member Send membership information ISM-NY Fed ID# 13-5329820

METHOD OF PAYMENT: P.O.# _____ Personal/Company check is enclosed \$ _____

VISA MasterCard Card # _____ Expiration Date _____

AMEX Amount to be charged: \$ _____ Cardholder's Signature _____

On - Site Seminars

Make a Commitment to Excellence: Professionalize Your Purchasing Team

Benefits of On-Site Training

- ◆ **Cost effective:** Save training and travel costs and time away from the office.
- ◆ **Flexible:** Courses can be combined and modified to meet your requirements.
Schedule seminars when it's best for you and your staff; Include training with your staff meetings.
- ◆ **Impact:** Provides uniform training; Strengthens your team's skills
Promotes interaction among departments; Incorporates your objectives; Increases morale
- ◆ **Professional:** Taught by experienced and accomplished practitioners.
Content continually reviewed and kept current.
Full-range of purchasing and supply management subjects.
Encourages participation, reviews of case studies and role-playing.
Participants earn ISM course certificates that can be applied toward CPSM, C.P.M., A.P.P. re-certification.

Purchasing Certification Program - CPSM

Help your staff become certified in their profession. A knowledgeable purchasing team is a powerful and successful team that makes a difference in bottom line performance. Make a commitment to excellence and provide your associates with a competitive edge by encouraging them to pursue the Certified Professional in Supply Management (CPSM) designation.

- ◆ On-Site CPSM Review Seminars provide educational training and tools.
- ◆ ISM-New York guides your associates through the examination and certification process.
- ◆ Fosters team spirit and goal orientation.
- ◆ Increases the prestige and recognition of your purchasing department.

CPSM Review

In recognition of the evolution of the purchasing/supply management profession, ISM has introduced the Certified Professional in Supply Management (CPSM) qualification. The CPSM reflects the expanded education, skills and experience needed to be a successful supply management professional.

ISM-New York can help you through the exam process if you attend CPSM Review Seminars taught by our highly qualified and trained instructors. Classes covering each of the three exams plus the bridge exam are being offered. Participants in these seminars will gain an understanding of the CPSM program and of the breadth of content covered in the exams. Each class includes an overview of exam content, question format and types, exam characteristics, scoring of exams and test-taking tips. The majority of each class is activity-based, focusing on exam content on which candidates may expect the most questions. Through case studies, questions and group discussions, CPSM candidates will have the opportunity to solidify their learning and to identify areas for further study. Exams are computer based and appointments can be made according to your schedule. Classes or exams do not have to be taken in order.

| | | |
|---|-------------------------|---|
| <u>Exam 1 Review</u> - Foundation of Supply Management | October 15, 2009 | Instructor: Sal Vitale, C.P.M. |
| <u>Exam 2 Review</u> - Supply Management Performance | February 8, 2010 | Instructor: Carla Lallatin, C.P.M., CPPO |
| <u>Exam 3 Review</u> - Leadership in Supply Management | June 7, 2010 | Instructor: Sal Vitale, C.P.M. |

Bridge Exam Rev.* - 2 days; offered twice; Oct. 27-28, 2009 & June 15-16, 2010 Instructor: Carla Lallatin, C.P.M., CPPO

* Holders of a valid C.P.M. meeting the requirements for the CPSM may elect to take a Bridge Exam rather than the three exams.

Requirements for Certified Professional in Supply Management (CPSM)

- 3 years of full-time, professional purchasing or supply management experience
- A bachelor's degree from a regionally accredited college or university
- Passing grades on the three exams **OR** if you are a C.P.M. in good standing, a passing grade on the Bridge Exam

Registration forms and additional information for examinations are available from ISM headquarters:
Telephone (800) 888-6276 Ext. 3001 or www.ism.ws/certification/

To discuss On-Site Seminars contact Peter Oppenheimer, C.P.M., Executive Director, ISM-New York
(516) 466-9822 or e-mail: poppenheimer@ismny.org

Contract Law - Legal Aspects of Purchasing

By Martin J. Carrara, J.D., C.P.M.

October 19, 2009

- A. Overview of Laws Governing Purchasing & Supply**
 - Common Law & establishment of precedents
 - Enactments of statutes by legislatures
 - The Uniform Commercial Code (UCC)
 - International Laws
 - Electronic commerce laws
- B. Role of Attorneys and Effective Use of Legal Counsel**
- C. The Law of Agency**
 - Authority, liabilities and duties of an agent
 - Agency law as basis for purchasing ethical standards
- D. Antitrust Laws**
 - Robinson-Patman Act and other antitrust laws
 - Antitrust aspects of electronic commerce
- E. Contract Law and Contract Formation**
 - What is a contract?; Essential elements; Battle of forms
 - Statute of Frauds; When is a written contract required?
 - Voidable and unenforceable contracts
- F. Warranties - Express and implied warranties for goods, services & computer information**
- G. Intellectual Property Rights**
 - Patents, trademarks, copyrights and trade secrets
 - Ownership of works made for hire
- H. Contract Terms**
 - Missing terms and UCC gap fillers
 - Delivery terms: UCC Mercantile Terms; INCO Terms
- I. Contract Performance**
 - Rights and obligations of purchaser and seller
 - Acceptance and revocation of acceptance
- J. Breach of Contract**
 - Material vs. Immaterial Breach
 - Anticipatory breach; Repudiation
- K. Remedies for Breach of Contract**
- L. Allocating Risk**
 - Indemnification; Limitations on liability
- M. Dispute Resolution**
 - Negotiation; Mediation; Arbitration; Litigation
- N. Developments in Laws Governing Purchasing**
 - Electronic contracting; Revisions to UCC Article 2

Cost-Price Analysis & Total Cost Concepts

By William L. Heaton, Jr.

January 28, 2010

- A. What Is Cost Analysis?**
- B. Principles of Cost Analysis**
- C. Cost Analysis Candidates**
- D. Cost vs. Price Analysis**
- E. Basic Cost Concepts**
- F. Elements of Cost**
- G. Cost Analysis Tools**
- H. Cost Analysis Worksheet**
- I. Cost Analysis in the Services Sector**
- J. Total Cost of Ownership**
- K. Identifying Cost Drivers**
- L. Analyzing Price Increase Proposals**
- M. Cost Analysis In Reverse Technique**
- N. Price Adjustment Formulas**
- O. Currency Exchange Rate Fluctuation Formulas**

Facilities Management & Construction Services

By Brian T. Kreiger

May 13, 2010

- A. Sourcing Process and Tools**
 - RFPs; Vendor Selection; Due Diligence
 - eSourcing & Auctions; Evaluation and Leveling
 - Contracts; Sarbanes-Oxley
- B. Facilities Management**
 - Operational Services - Mechanical; Electrical; Plumbing; Carpentry; Elevator Maintenance; Relocations; Movers; I.T. Moves, Additions and Changes
 - Cleaning and Disposal - Janitorial; Waste Removal and Recycling; Carpeting and Floors
 - Food Services - Cafeteria; Pantry; Vending
 - Security - Guards; Equipment
 - Landscaping; Roadways & Walkways; Exterminating
- C. Construction**
 - Leadership in Energy and Environmental Design and Environmental Sustainability
 - Professional Services - Project Management; Architectural; Engineering (Mechanical; Electrical; Plumbing; Telecommunications; Building Equip. Testing)
 - Construction Management & General Construction Strategy; Pricing Plans; Contracts; Subcontracting
 - On-Call/Framework Contracts
 - Pre-Purchased Infrastructure Equipment
 - Direct vs. thru Construction Manager - Generators, Uninterrupted Power Supply; Computer Room A/C; Power Distribution Units; Chilling Towers; Chillers

All public seminars are also available for on-site presentations.

Fundamentals of Purchasing Management

By Abate O. Kassa, C.P.M.

March 2 - 4, 2010

A. THE POWER OF PURCHASING

- Contributions of Purchasing
- Purchasing's New Muscle
- Purchasing as a Profit Center

B. THE ROLE OF PURCHASING

- Objectives of Purchasing
 - Top Management Perspective
 - Operating or Functional Perspective
- Organization and Responsibilities
 - Centralization vs. Decentralization
 - Cross-Functional Sourcing Teams
 - Scope of Responsibilities
- New Trends in Purchasing

C. THE PROCUREMENT PROCESS

- Policy and Procedure Manual
- Purchasing Ethics
- Key Steps in the Procurement Process
- Types of Purchase Requisitions
- Types of Solicitations

D. METHODS OF PROCUREMENT

- Competitive Bidding
- Contract Negotiation
- Value Analysis
- Blanket Ordering; Systems Contracting
- Consignment Buying; Joint Purchasing
- E-Procurement
- Procurement Card
- Outsourcing
- Counter Trade

E. SUPPLIER MANAGEMENT

- Structure of the Supply Market
- The Ideal Supplier; The Role of Suppliers
- Sourcing Strategies; Selecting Suppliers
- Stages of Supplier Development
- Managing the Supplier Base
- Evaluating Supplier Performance

F. CONTRACT NEGOTIATION

- Objectives of Negotiation
- The Negotiation Triad; Modes of Negotiation
- Stages of Negotiation
- Preparing for Negotiation
- Cost-Price Analysis; Competitive Intelligence
- Strategies and Tactics; Leverage and Power
- Concessions and Persuasion
- Questions and Active Listening
- Team Negotiation
- Ethics In Negotiation; Global Negotiation
- Alternative Dispute Resolution

G. CONTRACT LAW

- Purchasing Ethics and SOX
- Convention on the Int'l. Sale of Goods
- Uniform Commercial Code - USA
- Sources and Types of Law
- The Law of Agency
- The Law of Contracts
- Requirements of a Valid Contract
- Types of Contracts
- Types of Warranties
- Alternative Dispute Resolution
- Trade Terms - INCO Terms 2000

H. VALUE ANALYSIS

- Value-Added Management
- Product and Process Value
- Supply Value Chain
- Goals and Genesis of Value Analysis
- Kinds of Economic Value
- How To Analyze Value
- Types of Value analysis
- Case Study Demonstrations
- Mastering Change
- Organizational Strategies
- Improvement Opportunities & Tools

I. PURCHASING OF SERVICES

- Goods vs. Services
- Service Suppliers
- The Service Contract
 - Master Agreement
 - Statement of Work
- Contract Administration

J. INVENTORY MANAGEMENT

- Inventory Objectives and Functions
- Determining When and Quantity to Order
- ABC Analysis
- Cycle Counting

K. PERFORMANCE MEASURES

- Why Measure?
- Benchmarking
- Reactive vs. Proactive Purchasing
- The Purchasing Audit
- The Supplier Scorecard
- The Excellence Model
- Critical Success Factors

L. PROFESSIONAL CERTIFICATION

- Elements of Professionalism
- The CPSM Program

To register call (516) 466-9822 or use the form on the inside back cover.

Global Trade

By Thomas A. Cook
November 19, 2009

Best Practices in Managing Compliance and Risk

- A. Overview of Issues Involving Global Trade**
Review Opportunities, Challenges, Risks
- B. Dealing with Key Overseas Markets**
Identify and Target Strategic Markets
- C. Negotiating Contracts in Foreign Markets**
Protect Interests; Mitigate Risks; Identify Key Terms
- D. Logistics - Key Factors to Consider**
Selecting the Best Way to Move Freight
- E. Import / Export Compliance Management**
Review Critical post 9/11 Measures -
Customs-Trade Partnership Against Terrorism;
Importer Self Assessment; Trans. & Safety Admin.; etc.
- F. Import / Export Risk Management**
Identify and Mitigate Exposures; Types of Insurance
- G. Creating Corporate Trade Compliance Programs**
Benchmark; Standard Operating Procedures; Training
- H. Resource Tool Kit**
Personnel Skill Sets; Education
- I. Benefits of Using Technology For Compliance**
Denied Party Screening; Record Keeping
Automated Export System Transmission
- J. Cargo Insurance**
The Details Explained
What Coverage Is Needed To Mitigate Risk
- K. Hazardous Materials**
Understanding HAZMAT; Shipping Securely/Compliantly
How to Obtain HAZMAT Certification
- L. Government Agency Issues - Post 9/11**
Working Effectively With Trans. & Safety Admin. (TSA)
Bureau of Customs and Border Protection (CBP);
Bureau of Industry and Security (BIS)
- M. Evaluating Suppliers; Vendors; Channel Partners**
Freight Forwarders; Customs House Brokers; Airlines;
Steamship Lines; Agents; Distributors
- N. Resources**
Websites; Trade Journals; Consultants; Seminars

Human Capital Services Procurement Strategies

By Robert L. Cope
February 4, 2010

Understand Operational Issues and Key Success Factors

- A. Changing Business Environment**
Financial Pressures; Fickle Supplier Markets
Regulatory and Compliance Issues
Technological Changes; Change Management
- B. Internal HR Services Purchasing and HR Challenges**
Who is at the Table?; Who Owns the Spend?
Understanding the HR Mindset
Vendor Politics
- C. Human Resources Service Providers**
Talent Acquisition; HR Information Systems
Compensation and Benefits
Training and Development
- D. Evolving Human Resources Services Market**
New Tools and Technology
Third Party Intermediaries
Outsourcing Business; Workforce Trends
- E. Insource or Outsource?**
Corporate Culture & Core Competencies
Strategic vs. Tactical
Build or Buy?
Key Business Drivers
Cost-Benefit Analysis
Key Considerations and Success Factors
- F. Employee Benefits and Benefit Services**
Cultural and Competitive Considerations
Components of Price - Where are the Savings?
Retirement, Welfare and Total Rewards
Communication Strategies; Voluntary Benefits
- G. Innovative HR Procurement Strategies**
Flexible Staffing Strategy
Partnering vs. Outsourcing
Eliminating Administrivia
- H. Best Practices Research**
Staffing Vendor Management; HR Information Systems
Benefits Administration; HR Outsourcing
- I. Vendor Assessment**
Align with Cultural Objectives; Meet Business Objectives
What is Important and to Whom?
Balancing Quality, Service and Cost
- J. Contract Negotiations**
Is there a "Perfect Fit"? Legal and Compliance Concerns
Risk Management Issues; Service Level Agreements
- K. Measuring Success**
Ongoing Strategic Assessment
Effective Performance Metrics
Line of Business Feedback; Evaluation and Feedback

All public seminars are also available for on-site presentations.

Inventory Management in the Supply Chain

By Norman L. Heilweil, CPIM
December 8, 2009

Effective Inventory Control Leads to Increased Profits

A. The Materials Management Concept

B. Inventory Planning

- Is Inventory Required?
- How Much is Enough?
- Part Number Systems
- Unit of Measure
- Forecasting and Requirements Planning
- Methodologies for Determining When to Order
- Lead Time Elements and Analysis
- Determining Quantity to Order - EOQ and others
- Safety Stock - Pros & Cons

C. Inventory Control

- Classifying Inventory
- ABC Analysis (Pareto's Law)
- Record Accuracy
- Cycle Counting vs. Physical Count

- Back Order Control
- Transaction Processing
- Physical Control - Receiving & Stores
- Specification Change Control
- Inventory Turnover

D. Minimizing Inventory

- Standardization
- Scrap; Obsolete; Surplus Disposal
- Just-In-Time Concept
- Stockless Purchasing

E. Measuring Inventory Management Performance

F. Supply Chain Management

- Customer Satisfaction
- Supplier Measurement

Legal Aspects of Technology & Software Acquisitions

By Martin J. Carrara, J.D., C.P.M.
May 6, 2010

A. Introduction

- License of Software vs. Purchase of Goods and Services
- Laws Governing Technology and Software Agreements
- Intellectual Property Rights

B. Key Issues in Software License Agreements

- Types of Licenses; Defining the Licensee
- Defining the Scope of Use
- Updates, New Releases, Enhancements
- Dealing with Assignment, Mergers, Divestitures
- Ownership of Modifications and Customizations
- Warranties
- Self-Help and Electronic Repossession
- Intellectual Property Infringement
- Indemnification, Remedies, Limitations on Liability
- Revenue Recognition
- Software Source Code Escrow
- Training, Support and Maintenance
- Common Traps to Avoid

C. Key Issues in

Software Development Agreements

- Defining the Requirements
- Performance Obligations
- Development Milestones and Timeframes
- Acceptance Testing
- Systems Integration
- Ownership and Modifications

D. Key Issues in

Hardware Acquisition Agreements

- Warranties
- Indemnification, Remedies, Limitations on Liability
- Software Issues

E. Key Issues in

Application Service Provider Agreements

F. Trial and Test Agreements

G. Shrink-Wrap and Click-Wrap Agreements

- What They Are and When They Are Enforceable

H. Developing Laws in Electronic Commerce

To register call (516) 466-9822 or use the form on the inside back cover.

Marketing and Advertising Sourcing Strategies

By Joanne Davis
March 18, 2010

Tools for Effectively Obtaining Marketing and Advertising Services

Seminar Includes Interactive Exercises

A. The Marketing Communications Landscape

- Holding Companies
- Market Share of Holding Companies
- Key Holding Company Agency Brands
- Types of Agencies: Creative, Media, Interactive, Digital, Promotion

B. Agency Economics

- How Agencies Make Money
- How to Compare Agencies
- Compensation Models
- Bonuses and Incentives

C. Differences in Buying Marketing & Advertising Compared to Buying Other Services

D. What Motivates Your Marketing Colleagues?

- Qualitative and Quantitative Research

E. What Motivates Agencies?

- Qualitative and Quantitative Research

F. How to Negotiate With Agencies

- Role-Play Exercise to Practice New Knowledge

G. Agency Contracts and Terms and Conditions

- The Role Purchasing Can Play

H. Agency Scope of Work

- How to Brief and Get Correct Staffing and Fee Plans

I. How to Conduct an Agency Review

- What Purchasing Should and Should Not Do

J. Agency Evaluations and Assessments

- Putting Skin Into the Game

K. Managing Multiple Agencies

- Best in Class vs. Coalition

Purchasing Negotiations

By Rosary Immordino, C.P.M.
March 11, 2010

A Course In Negotiation Skills - Is Win-Win Enough?

Seminar Includes Practice Negotiations

A. Win-Win, Win-Lose and the Negotiator's Dilemma

- Creating Value vs. Claiming Value

B. Claiming Value

- Tactics for Claiming Value
- Settlement Range
- Initial Offers
- Influencing the Bottom Line
- Commitments

C. Negotiating with Sole Sources

D. Dealing with Difficult Tactics

E. Negotiation Skills

- Firm, Open, Neutralizing
- Packaging

F. Creating Value

- Interests
- Needs
- Creative Options
- Sources for Creating Value
- Shared Interests
- Differences

G. Stages of Negotiation

- Plan
- Create the Climate
- Define the Problem
- Understand the Problem Fully
- Brainstorm Creative Options
- Make Proposals
- Come to Agreement
- Post-Negotiation Review

To register call (516) 466-9822 or use the form on the inside back cover.

Print Buying Essentials

By Don Carli
January 21, 2010

Understanding Print Buying

- A. Key Printing Industry Trends**
Economic; Market; Technology; Application
- B. Printing Methods**
Offset
Sheet fed
Web
Flexography
Screen
On Demand and Digital Printing
Inkjet
Electro photographic
- C. Variable Data**
Substrates; Inks; Coatings
Binding; Finishing; Fulfillment
- D. Qualifying and Selecting Print Service Providers**
RFIs; RFQs; RFPs
Printing Specifications
Methods for Submitting Jobs
Preflighting; Proofs; Plant Visits; Press Approvals
Sources for Creating Value
- E. E-Procurement and Outsourcing Solutions**
Costing and Pricing Strategies
- F. Printing and Graphics Software**
Working With Your Designer
- G. Savings Opportunities and Best Practices**
- H. Sustainable and Green Printing Trends**
- I. Additional Resources**
Major industry associations
Publications
Learning Resources

Project Management Skills for Sourcing Professionals

By William E. Hooker, C.P.M.
October 8, 2009

Develop Your Skills In Integrating Project & Supply Management

- A. Pre-Launch Spend Diagnostic**
Define Return On Investment and Value
Strategic Alliances
- B. Understand the Spend**
How Much Is Your Company Really Buying?
- C. Analyze Market Conditions**
Five Steps In Market Analysis
Purchasing Power Determination Matrix
- D. Expand Supplier Horizon**
Current, Alternative, Non-Traditional Suppliers
Evaluating Suppliers
- E. Determine Early Strategies**
What To Do If You Have Power
What To Do If You Don't Have Power
- F. Prepare RFIs and RFPs**
Internal and External RFIs
Why the RFP is the Key to Success
- G. Analyze Responses and Plan Negotiations**
Supplier Visits
Ingredients for a Successful Negotiation
- H. Conduct Negotiations**
Needs vs. Wants
Contingency Plans
- I. Important Findings**
Stakeholder Interests
Implementation - A Team Effort

All public seminars are also available for on-site presentations.

Purchasing of Services

By Carla Lallatin, C.P.M., CPPO
February 25, 2010

Ensuring Supplier Performance Meets Your Services Needs

A. Defining Service Contracting

- Growth
- Considerations
- Categories of Services
- Differences: Services vs. Supplies

B. Buying Nontraditional Services

- Definition
- Opportunities
- Supply Management's Role
- Process

C. Planning the Purchase

- The "Make-or-Buy" Decision
- Planning and Definition
- Performance and Cost

D. Developing the Statement of Work

- Performance Requirements
- The Statement of Work
- Terms and Conditions
- Independent Contractor vs. Employee
- Tips on Buying Services
- Cost Projections
- Solicitation Documents

E. Evaluation of Offers

- Review of Offers; Evaluation; Negotiation

F. Service Contracts

- Contract Development; Types of Contracts
- Project Manager
- Monitoring Performance; Contract Administration

Supplier Diversity - A Purchasing Perspective

By I. Javette Hines, J.D. and Keith Hines
April 22, 2010

Developing and Managing a Successful Supplier Diversity Program

A. Why Supplier Diversity?

- Making a Business Case for Your Program
- Expanding Existing Programs

B. Characteristics of a Successful Supplier Diversity Program

- Defining Goals and Objectives
- Executive Involvement
- Tracking and Auditing

C. Implementing and Managing a Program

- Establishing a Mission Statement
- Policies and Procedures
- Developing Activity Reports

D. Designing a Budget

- How Much Do You Need?
- Gaining Support

E. Communication Strategies and Methods

- Selling Your Program Internally
- External Marketing

F. Benchmarking - How, When and Who

G. Second Tier Sourcing

- Starting a Program
- Jump Starting Existing Program

H. Components of a Strategic Plan

- Preparing a Plan for Senior Management

I. Sourcing Diverse Suppliers

- Most Effective Methods

J. Mentoring Diverse Suppliers - How, When & Who

K. Professional Services Issues

- Sourcing, Developing & Gaining Support

L. Small Business Development

To register call (516) 466-9822 or use the form on the inside back cover.

Supplier Relations, Ethics and Social Responsibility

By Carla Lallatin, C.P.M., CPPO
June 3, 2010

Understanding Issues, Guidelines and Standards of Purchasing Ethics

- A. Ethics Defined**
 - Ethical vs. Legal
 - Ethics and Business Practices
 - Personal, Professional and Business Ethics
 - Differences: Services vs. Supplies
 - Social Responsibility Defined
- B. Supplier Relations**
 - Building Blocks for Strong Relationships
 - Avoiding Behaviors that Erode Relationships
 - The Impact of Changing Relationships
- C. Policies**
 - Ethics
 - Social Responsibility
 - ISM Principles and Standards
 - Corporate Wide vs. Purchasing Specific
 - Management's Role
 - Implications for Teams
- D. Acceptable/Unacceptable Behavior**
 - Treatment of Suppliers
 - Negotiations
 - Contract Management
 - Suppliers
 - Controls and Consequences
- E. Practical Applications**
 - Hypothetical Situations
 - Addressing the Real Issues
 - Case Study

Buying Travel Related Services

By Howard Z. Brooks
April 8, 2010

Strategies for Savings

- A. Business Trips: A Philosophical Perspective**
- B. Agency Configuration Options:**
 - Is On-Site Necessary?
- C. Funding Your Agency**
- D. Travel & Entertainment Policy Creation**
- E. Ethics & Responsibility for Travel Decisions**
- F. Surviving a Sarbanes-Oxley (SOX) Audit**
- G. Ensuring Compliance**
- H. Selling Use of Self-Booking Tools Internally**
- I. Optimizing Airline Negotiations**
- J. Hotel Program Perspectives**
- K. How to Perform a Site Inspection**
- L. Car Rental Contracts**
- M. Curing the Car Service Headache**
- N. Benchmarking Pitfalls**
- O. Creating a Revenue Generating Corporate Card Program**

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Special Educational Events

ISM-New York Offers a Variety of Educational and Networking Opportunities In Addition to a Full Schedule of Seminars

Regular Meetings

ISM–New York regular meetings feature presentations by guest speakers on current purchasing topics, networking opportunities and breakfast or dinner. They are an excellent way to learn about purchasing issues as well as meet other procurement professionals. Meetings are held at the New York Hilton Hotel, 1335 Avenue of the Americas at 53rd Street. The ISM-NY newsletter, *Competitive Edge*, and the ISM-New York website, www.ismny.org, provide details about meeting programs. To register, please call the ISM-New York office at (516)466-9822 or e-mail poppenheimer@ismny.org.

Sourcing Group and Committee Meetings

ISM-New York schedules Sourcing Group meetings throughout the year for members who have purchasing or sourcing responsibilities in certain major commodity and services areas. The ISM-New York Supplier Diversity and Green Committees also meet on a regular basis. A benefit of membership, these meetings provide members with the opportunity to discuss common topics and issues and also offer excellent opportunities for effective networking.

ISM-New York Supply Management Symposium

The 17th Annual ISM-NY Supply Management Symposium will be held on November 12, 2009 at the New York Hilton. The Symposium will feature five high level presentations on leading edge purchasing topics, as well as a speaker panel discussion and networking opportunities. A description of the Symposium is on page 5 as well as on the website, www.ismny.org, and in the *Competitive Edge* newsletter.

ISM-New York Annual Conference

The 27th Annual ISM-New York Conference will be held on March 26, 2010 at the New York Hilton. The Conference will include presentations by five top speakers, educational exhibits, panel discussion and networking opportunities. ISM-NY will also be presented with a Mayoral Proclamation declaring March Supply Management Month. Watch the ISM-New York website and *Competitive Edge* for details.

ISM Satellite Seminars

ISM-New York will present three ISM 2009-2010 Satellite Seminar Series at no charge to ISM-NY members. These televised panel discussions will be broadcast from 10:00 - 2:30 at the City of New York Citywide Training Center, 2 Washington Street, Room 1980 or 1995, New York City.

The program schedule is as follows:

| | |
|-------------------|---|
| October 22, 2009 | A Supply Manager's Guide to Defining/Applying Economic and Financial Concepts |
| February 11, 2010 | Talent and Career Management for Supply Professionals |
| April 22, 2010 | Rails, Roads, Water and Air: Logistics, Inventory, Distribution |

Faculty Biographies

Howard Z. Brooks is Category Manager - Travel for ICG Commerce, a leading procurement outsourcing firm. He is currently consulting as the travel subject matter expert for one of their largest global clients. Previously, he was Vice President of Procurement, Travel & Related Services within the Publicis Groupe, one of the world's largest communications and media companies. Before joining Publicis Groupe, he was Vice President, Travel & Procurement Services at Sony Music Entertainment. He is a member of the Association of Corporate Travel Executives' and the National Business Travel Association. In 2004, he received the Association of Corporate Travel Executives Most Influential Executive Award and in 2003, he was awarded Best In Class by Business Travel News for his online booking tool implementation. He has a degree in Finance from New York University, is a certified Six Sigma Greenbelt and is a Senior Industrial Engineer.

Don Carli is Senior Research Fellow with the Institute for Sustainable Communication, co-founder of SustainCommWorld LLC, and CEO of the marketing research consultancy Nima Hunter Inc. Previously, he held senior management positions as Technical Director and Plant Manager of the Crafton Graphic Company. Mr. Carli is an adjunct professor of Advertising, Design and Graphic Arts at New York City College of Technology of the City University of New York. He is Sustainability Editor of Graphic Arts Monthly Magazine and has frequently been quoted on issues related to sustainability, printing, publishing and marketing. A graduate of St. Lawrence University, he is on the Board of Advisors of the American Institute of Graphic Arts Center for Sustainable Design. In 2008 he received the Partnership in Print Production Luminaire Award recognizing outstanding achievement and personal dedication by graphic communication industry innovators committed to educating themselves and others.

Martin J. Carrara, J.D., C.P.M. is Senior Corporate Counsel at Wyeth Consumer Healthcare. Previously, he was Senior Corporate Counsel, Manufacturing and Operational Support at Pfizer and Senior Counsel, Procurement and Real Estate at Pharmacia prior to its merger with Pfizer. He previously held senior supply and contract management leadership positions with Citibank, Verizon, and L.K. Comstock and Co. Mr. Carrara is the author of the ISM Contract Development and Administration Workbook and co-editor of the "Legal Aspects of Purchasing" chapter in The Purchasing Handbook. He is Vice President and Secretary of the New Jersey Corporate Counsel Association and chair of the NJCCA Commercial Law Committee. He is a former member of the ISM Ethical Standards Committee, former President of ISM-NY, and was the 1995 recipient of its J.H. Leonard Award. Mr. Carrara holds a J.D. from Fordham University and an MBA from Wagner College. He is a member of the New York and New Jersey Bars.

Thomas A. Cook is Chief Executive Officer of American River International, an international consulting services firm focused on global trade issues and logistics. Mr. Cook is considered by many professionals to be an expert in the field of global logistics and international operations. He has written over 225 articles and published seven books on international trade, the latest being, *Managing Global Supply Chains*. He has lectured all over the world on global trade subjects and also serves on the boards of many organizations, including the Trade Resource Group of Customs in Washington, DC, The Small Business Exporters Association, North American Exporters Association, World Trade Magazine, American Management Association and the New York District Export Council. Mr. Cook is a graduate of Maritime College at Fort Schuyler, NY with a B.S. in Transportation Science and a graduate degree in Transportation and Business Management.

Robert L. Cope has over thirty years of experience in employee benefits and human capital consulting, and corporate risk and insurance management. He is currently Senior Vice President of USI Employee Benefits and head of their New Jersey benefits practice. Mr. Cope has been a senior officer in several insurance, employee benefits and human capital consulting firms where he developed procurement-based benefit sourcing methodologies. He has served in senior leadership positions in the financial services industry and has been a member of the New York Stock Exchange Insurance Committee, the American Bankers Association Insurance and Protection Committee and Chairman of Aetna's Client Advisory Group. Mr. Cope has a B.S. in Business Administration from Bob Jones University.

Joanne Davis is a consultant specializing in helping client companies source, select, negotiate fees and contract with marketing and advertising firms. Her recent clients include the U.S. Department of Defense, Pfizer, Johnson & Johnson, Bausch and Lomb, BlueCross BlueShield, Fidelity, IBM, Macy's, Office Depot, The Guardian and VF Corporation. She spent the first 20 years of her career working for and subsequently running advertising agencies owned by firms including Omnicom and Interpublic. For the past nine years, she has coached hundreds of Fortune 100 marketing and procurement executives in agency management. A frequent speaker, Ms. Davis is also a faculty member of the Association of National Advertisers and has written several best selling books including *A Guide to Hiring an Advertising Agency*, *Optimizing Client Agency Relations* and *Agency Audits*. Ms. Davis graduated from the College of New Rochelle and did post-graduate study at NYU.

William L. Heaton, Jr. is a co-founder, President and Chief Engagement Officer of JVKellyGroup, an expense management consultancy and purchasing outsourcing firm established in 2002. He has twenty-five years of experience in strategic sourcing, purchasing and expense management. Prior to joining JVKellyGroup, he was based in London as managing director of Deutsche Bank's private client purchasing division. Additionally, Mr. Heaton worked at Citibank where he was responsible for U.S. purchasing operations. He also spent ten years with Verizon as a purchasing cost analyst and contract negotiator. Mr. Heaton has a BBA in marketing from Pace University and an MBA in management from C.W. Post College.

Continued on Next Page

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Faculty Biographies

Continued from Previous Page

Norman L. Heilweil, CPIM is President of the Manufacturing Education Institute. He has over twenty-five years of varied manufacturing experience in small and large firms. As a materials manager and manufacturing manager, Mr. Heilweil designed and implemented manufacturing management systems. His background also includes engineering design, methods, tooling and purchasing. He has a B.S. in mechanical engineering and an M.S. in industrial engineering from New York University.

I. Javette Hines is Senior Vice President and Manager of Supplier Diversity for Citi, responsible for leading the procurement organization in the development of sourcing strategies which ensure that women, minority and small businesses are an integral part of the sourcing selection process. Previously, at IBM, she held positions as the Services Procurement Senior Contract Specialist as well as the U.S. Sourcing Manager for Technical Services and Program Director of IBM's Supplier Diversity program. Ms. Hines is a graduate of Clark College and Wake Forest University School of Law and is a member of the Women in Law and Gender and Equity Committees for the New York State Bar and the National Black MBA Association.

Keith Hines is Director Sourcing and Negotiations for PricewaterhouseCoopers. Previously, he was Director of Supplier Development for PwC, responsible for developing and directing their supplier diversity program. Prior to joining PwC, Mr. Hines was Director of Purchasing for Cushman & Wakefield, where he was also charged with creating a supplier diversity program. Previously, he was Manager of Corporate Purchasing for Altria, where he served as chairperson of the supplier diversity task force for the Altria family of companies, which included Kraft Foods and Philip Morris. He has served on the Boards of the National Minority Supplier Development Council and Women's Business Enterprise National Council. Mr. Hines has an MBA in International Business from New York University.

William E. Hooker, C.P.M. is the Manager of Strategic Sourcing at Novo Nordisk, the world's largest insulin manufacturer. Most recently, Mr. Hooker was Director of Strategic Sourcing for MedImmune Vaccines, a leading biotech company. Previously, he was Senior Director of Strategic Sourcing at Bristol-Meyers Squibb. Throughout his more than twenty years of progressive purchasing experience, he has participated in and led many cost savings projects. He co-developed a strategic sourcing project methodology that has repeatedly yielded double-digit savings, as well as value enhancements. Mr. Hooker holds a B.A. from Mercyhurst College and an MBA from Cleveland State University.

Rosary Immordino, C.P.M. is a training consultant who specializes in negotiation and purchasing. As a former senior buyer, Ms. Immordino uses her experience in both purchasing and training to provide relevant, hands-on training programs for purchasing professionals. Prior to starting her own consulting business, Ms. Immordino was Associate Director of Training and Organizational Development for a large Corporate Sourcing Department, where she was responsible for developing the training programs that helped transform purchasing into strategic sourcing. She received her M.A. in Organizational Psychology from Columbia University Teachers College, where she focused on the areas of negotiation and adult learning.

Abate O. Kassa, C.P.M. is President of AOK Consulting & Education. He is a former Purchasing Manager of Ethiopian Airlines where he introduced a corporate-wide value improvement process. He also served ISM-NY as Executive Director. Mr. Kassa specializes in purchasing and supply management, value management and change management. In 1994-96, he advised the International Trade Centre on a \$1 billion procurement project. In 1999, he served as ITC consultant in several South Pacific countries. Mr. Kassa is a recipient of ISM-NY's J.H. Leonard Award and ISM's Presidential Citation. He holds a B.A. in economics (with distinction) from Addis Abeba University and an M.A. in government and politics from St. John's University, N.Y.

Brian T. Kreiger is a Director in Firmwide Sourcing at Morgan Stanley, where he is responsible for managing corporate sourcing of construction, design and facilities management activities in the Americas. Previously, he was Director of Corporate Sourcing at MetLife, where he managed a 64 person staff responsible for procuring all non-I.T. commodities and services. Earlier in his career at MetLife, he held management positions supporting over 250 corporate, administrative and sales offices as manager of facilities and services integration, manager of office design, regional director of facilities and services and manager of building operations administration. Mr. Kreiger holds a B.A. in Education from Montclair State University.

Carla S. Lallatin, C.P.M., CPPO is President of Lallatin & Associates, specialists in supply management. She has conducted seminars throughout North America and has experience in all phases of purchasing, including as chief purchasing official for D&B's BidNet, United Computing, the City of New York and the State of Wyoming. A past chair of ISM's Ethical Standards Committee, Ms. Lallatin has served on the National Association of State Purchasing Officials, and the NIGP Board of Directors. She was named Woman of the Year by the American Business Women's Association. Ms. Lallatin served on the NYC Procurement Policy Board and as adjunct faculty at New York University. She is a past President of ISM-New York and received the 1995 District VIII Erlicher Award. She holds a B.A. from the University of Missouri.

Sal Vitale, C.P.M. is Procurement Director of Marketing and Advertising at American Express. He is responsible for leading the Marketing Services & Advertising procurement team in driving strategic sourcing strategies, cost reduction initiatives, negotiations, contract execution, supplier management, operational efficiencies and bypass elimination. He works closely with internal customers to build partner-based relationships to drive internal satisfaction and strategic alignment. Mr. Vitale graduated with honors from Baruch College with a BBA, and received his MBA in Marketing Management from Wagner College. He is a former President of ISM-New York and was the recipient of its J.H. Leonard Award in 2005.

ISM - New York reserves the right to substitute instructors.

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Membership Benefits

1. **Professional Development** - Enhance your career and job performance
2. **The CPSM Program** - Gain knowledge, confidence, respect and promotability through certification.
3. **Inside Supply Management*** - Magazine features articles, case studies and information you can apply immediately.
4. **Report On Business*** - Considered by many economists to be the most reliable economic barometer available.
5. **ISM's Annual International Purchasing Conference** - Unparalleled educational and networking opportunity.
6. **Center for Advanced Purchasing Studies (CAPS)*** - Free research reports dedicated to supply management.
7. **ISM Online*** - Unlimited access to extensive database for information and articles on supply management issues.
8. **Membership Meetings** - Make valuable contacts and stay on top of industry trends through educational presentations.
9. **Sourcing Group and Committee Meetings** - Discuss common topics and issues in major areas of interest.
10. **Competitive Edge** - ISM-New York's newsletter.
11. **Membership Directory** - Who Is Who in ISM-New York.
12. **Leadership Development** - Opportunities to serve as Committee Chair or Board Director.
13. **ISM* & ISM-NY Career Center**- Search job opportunities, post your resume, or list a position you're trying to fill.
14. **Recognition & Awards; Scholarship Opportunities.** * Included in Regular Membership

Who Can Join the Institute for Supply Management (ISM) and ISM-New York?

- A person who is involved in the purchasing or supply process, including without limitation, purchasing, purchasing research, value analysis, inventory control, materials management, supply chain management, or any other activity or function which is related to the purchasing and supply process.
- A full-time teacher, research specialist, department head, director or dean of a college, university, or other academic institution whose academic responsibility includes purchasing and supply management or other related fields.
- An undergraduate or graduate student enrolled full time in an accredited two or four-year college or university.
- A person who is engaged in the business of providing consulting services primarily in the field of purchasing and supply management on condition that such person does not solicit members for consulting engagements.

In principle and in practice, the association values and seeks a diverse membership. There are no barriers to full participation on the basis of ethnic background, gender, creed, age, sexual orientation, national origin or disability.

APPLICATION FOR MEMBERSHIP

Peter Oppenheimer, C.P.M.
Tel. (516) 466-9822

ISM-New York

69 Susquehanna Avenue

Fax (516) 466-4141

Great Neck, NY 11021

ISM-NY Fed ID# 13-5329820

I wish to apply for membership in ISM-New York. If approved, I agree to abide by the Association's Bylaws and subscribe to the Institute for Supply Management's Principles and Standards of Purchasing Practice and Statement of Antitrust Policy.

I APPLY FOR REGULAR MEMBERSHIP Regular Members are voting members and hold membership in both ISM-New York and ISM. Annual dues: \$285 (includes two meetings) plus a one-time charge of \$25 for ISM-NY initiation fee and \$20 for ISM administrative fee.

I APPLY FOR ASSOCIATE MEMBERSHIP Associate Members are non-voting members in ISM-New York only. They need to be sponsored by a regular member from the same organization. Annual dues: \$185 (includes two meetings) plus a one-time \$25 initiation fee.

I APPLY FOR STUDENT MEMBERSHIP Dues waived for full-time students. Attach a copy of current school issued class schedule.

I APPLY FOR CORPORATE MEMBERSHIP Organizations with ten or more members qualify for discounted membership rates.

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REGISTRATION INFORMATION

FOUR EASY WAYS TO REGISTER:

Tel. (516) 466-9822 Fax (516) 466-4141 E-mail: poppenheimer@ismny.org
By Mail: ISM-New York, 69 Susquehanna Avenue, Great Neck, NY 11021-3819

TO REGISTER: Please complete and return this registration form. Registrations must be made in advance and are subject to confirmation.

REGISTRATION FEE: The full fee as designated for each program is payable in advance and includes cost of meeting materials, break refreshments, and a light lunch. Tuition fees will be reduced by 10% for a company team of 3 or more registrants attending the same seminar. Please make checks payable to ISM-New York.

| | Member | Non-member | | Member | Non-member |
|---------------|---------|------------|----------------------|-----------|------------|
| 1-day seminar | \$395 | \$495 | CPSM Review Seminars | \$395/day | \$495/day |
| 2-day seminar | \$790 | \$990 | Satellite Seminar | No charge | \$65 |
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NON-MEMBERS of ISM-New York but members of other ISM affiliates or APICS are welcome to attend ISM-New York educational programs at member rates.

EDUCATION CENTERS: ISM-New York's Seminars are held at Pfizer, 150 East 42nd Street, New York City, from 9:00 A.M. to 5:00 P.M. ISM-New York holds its annual Symposium and Conference as well as regular monthly meetings at the New York Hilton, 1335 Avenue of the Americas, 53rd Street, New York City. ISM Satellite Seminars are held at the City of New York Citywide Training Center, 2 Washington Street, Room 1980, New York City.

CANCELLATIONS AND REFUNDS: Confirmed registrations can be cancelled and tuition refunded, less a \$75 administrative fee, if cancellations are received no later than seven days prior to the event. Registrants that have been confirmed (and not cancelled on time) but are unable to attend an event are liable for the entire fee. Registrants who fail to appear are not entitled to a refund. Substitutions may be made at any time.

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Please register me for _____ that will be held on (date) _____

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