

NCMA News

San Diego Chapter



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Dan Chalfant - Chapter President
President's Message

Interested in Becoming a NCMA Member?

Go to <http://www.ncmasd.org/membership/joinncma.html> to learn more about membership benefits and dues.

Message from the President:

Our Spring Seminars were really exciting this year! If you attended these events, your contract management job just got a lot easier! In March, we had Capital Edge present on Hot Topics in Government contracting. In April, we had Baker Tilly presenting on making Cost/Price Proposals easier to prepare, analyze and negotiate. In May, we had Kevin Lombardo show us how to make Import/Export a lot easier.

This Month, all San Diego chapter members are invited to attend the San Diego Padre baseball game on 20 June, 2018, at 12:40 pm. Free tickets are available for the first 24 members to RSVP. Additional tickets are available for around \$29 each.

Congratulations to our new elected officers! In September, we hope to have Rear Admiral David Lewis, the Director of DCMA speak to the San Diego chapter.

The meetings are always the Third Wednesday of each month, always start at 8:00 am, always include breakfast, and are always at Admiral Baker Clubhouse in Mission Valley. You can register on our website at ncmasd.org or pay at the door. We try to make it easy!

We also need volunteers for chapter committees including; Employment, Website, Publicity, DoD Liaison, Fellows & Awards, Newsletter Editor, College Outreach, Small Business, and Social Media. If you are interested in serving for the 2018-2019 program year, please send an email to Kristina M. Schultz at kristina.schultz@myvpsi.com.

Daniel Chalfant
President, NCMA San Diego

Commercial Item Workshop
By Kim Hang, NCMA San Diego Chapter Member



NCMA welcomed Jeffrey A. White of J.A. White & Associates, Inc. to speak to Commercial Item requirements and recent trends and finding of Contractor Purchasing Systems Reviews (CPSR). Mr. White came to share his knowledge on how to determine and document Commercial Item Determination (CID), how CPSR audit teams are honing in on CID and finding inadequacies with contractors' documentations, and new oversight established by DCMA. There are eight definitions by which one can determine if an item can be considered commercial or not; Mr. White strongly encourage reading these definitions closely and consider the intended use of the item when reading these definitions. Recent trends of CPSR audits suggest the government is focusing on commercial items; numerous contractors have had inadequate CIDs as one of the findings from CPSR audits. DCMA has established a database called the Commercial Item Centers of Excellence, where they have gathered a list of items that have been determined commercial items.

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Contractors can access the list and see if the item they are purchasing has been determined commercial already by DCMA or not.

A strong take away from this presentation is to “have a conversation with the definition” of commercial items. As an example, “It is my opinion this item meets the commercial item definition because it is non-government, sold and offered to the general public.” Be sure to address every part of the definition in the write-up and document all actions taken to determine commerciality. Get a technical evaluation and do market research as necessary. And remember a commercial item determination does not equal price analysis. One must address price analysis of the item as well.

***Government Property Technical Applications Seminar
By Jill Haynie, NCMA Chapter Secretary***

Dr. Doug Goetz presented a lively discussion of current Government property requirements and challenges at an all-day seminar at Admiral Baker on February 21, 2018. Attendees were treated to Dr. Goetz’s unique approach, including jokes about Government acronyms such as: “The DOE has the DEARS but I don’t want you to fawn over it.”

The interactive presentation included an in-depth analysis of current property issues, subcontractor monitoring, and changes in property system reviews that are pending. Dr. Goetz stressed that Contracts and Property professionals should work together, as their roles overlap. He also mentioned that finance should be involved in the process, so that companies have a complete picture of the FAR and DFARS regulations to ensure that they are in compliance. As an example, he discussed the importance of understanding the limited risk of liability clause, wherein the Government accepts the risk of loss or damage to property under cost type contracts. Insurance costs for property on these contracts incurred by a company are unallowable. Dr. Goetz also presented an in-depth discussion of title to Government property under the various contract types.

Dr. Goetz is a recognized expert in the field of Government property. He has officially retired from the Defense Acquisition University but he has returned as a Professor of Contract and Property Management on an intermittent basis. He currently has a consulting business, GP Consultants, and conducts classes throughout the United States, including the National Property Management Association (NPMA) conferences and the NCMA World Congress. He previously served on the Air Force Institute of Technology (AFIT). He chaired the DFARS Supplement 3 Rewrite Committee, where he was the principal author of the DoD Manual DoD 4161.2-M, which has been utilized by all Government Property Administrators. He received his BA and MA from Hunter College of the City University of New York and received his Doctorate from THE Ohio State University in National Security Policy Studies and Adult Education. He is an accomplished musician who has played with the Mormon Tabernacle Choir.

***Source Selection: The Total Evaluated Price Webinar
By Jill Haynie, NCMA Chapter Secretary***

The Total Evaluated Price webinar was hosted by Macias Gini and O’Connell LLP (MGO) at their offices in Carmel Valley on January 25, 2018. Tom Wells, Vice President of Dayton Aerospace,

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discussed price and cost techniques used by the Government in source selection. Attendees included two potential new members, one of whom is new to the field of Government contracting.

The audience listened as Tom discussed the Government’s approach to analyzing proposals and what contractors can do to prepare successful proposals. One of the most helpful pieces of advice is to read every word in the RFP, which is also good advice when reviewing contracts. Tom also presented insight into the types of adjustments that the Government makes when determining adjustments such as cost realism.

Tom also discussed the best value continuum, including the FAR 15.304(c)(1) requirement that cost/price be evaluated in every source selection. Other topics included balanced pricing, procurement preference program adjustments like HUB Zones, value added total evaluated price (VATEP), and payment terms – discounts that are offered are not considered in making the award decision.

NCMA presents regular webinars. Information on these webinars, past and present, can be found on the National web site:

Webinars on Demand: <https://www.ncmahq.org/learn-and-advance/events-education/virtual-education/on-demand/webinars-on-demand>

Live Webinars: <https://www.ncmahq.org/learn-and-advance/events-education/virtual-education/live-webinars>

Toys for Tots

By Tammie Rippie, NCMA Chapter Outreach Business Volunteer



The San Diego NCMA Chapter celebrated the holidays by participating in their 6th annual U.S. Marines Toys For Tots toy drive at Admiral Baker Club in San Diego on December 13, 2017. NCMA teamed up with Amec Foster Wheeler, KMEA, the Girl Scouts and MGO for the toy drive, together we collected more than 5 large boxes of toys and 13 bikes. On December 19, 2017 we formed a caravan with 3 pickup trucks and 1 car to deliver the toys to The Naval Marine Corps Reserve Center. This year’s toy drive was a huge success and we thank everyone for the generous donations that ultimately brightened the holidays for those less fortunate.

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NCMA College Outreach – CSUSM on November 2017
By Reina Bergfors, NCMA Chapter College Outreach Chair

NCMA-SD College Outreach participated in the California State University-San Marcos Panel on Careers in Government and Non-Profits on November 13, 2017. Brian Greenberg of NCMA-SD Chapter joined three other panelists, from non-profits, in speaking to the approximately 15 student attendees about their career paths, typical positions found in each field, and advice for students looking to enter the field. Brian gave several examples of how contract management skills are needed in both government and industry organizations and emphasized the importance of professional organizations. Reina Bergfors gave a short overview of how NCMA programs support the contract management profession. Most of the students had questions on contracts and took many of the information materials.

College Outreach Event – TJSJL March 2018
By Reina Bergfors, NCMA Chapter College Outreach Chair

NCMA-SD College Outreach participated in the Thomas Jefferson School of Law Alternative Careers Panel on March 15, 2018. Four panelists presented information about their careers and how a degree in law would benefit each career. Other panelists were a media communications director from the San Diego City Attorney's office, the CEO of Feeding San Diego, and a law reference librarian. 15 students and several staff members were in attendance.

Reina Bergfors of NCMA-SD Chapter spoke about what the contract management profession does in both business and government offices and how a law degree would enhance a contract manager's ability to excel in the profession. Several examples were provided of how contract management skills help in meeting business objectives. A short overview was presented of how NCMA programs provide educational support for the contract management profession. Most of the students had questions on contracts and took many of the information materials.

Scholarship Award Spotlight - Tisha Martz
By Kristy Schultz, NCMA Chapter Education Director



The NCMA San Diego, CA Chapter is delighted to announce Tisha Martz as the Fall 2017 scholarship award recipient. On Saturday, August 5th 2017 Tisha took and passed the Certified Professional Contracts Manager (CPCM) exam. Passing any one of the three certificate (CPCM, CFCM, or CCCM) exams offered by NCMA is no easy task. This is why the NCMA San Diego, CA Chapter is passionate about supporting local members, like Tisha Martz, who pursue higher education in the contracting field.

Tisha explains that her “contracting career sort of began by accident”. She was working for “social service non-profits and managing grants that the agencies had received”. She was considering getting “out of non-profit work so I started working at SDSU managing contracts

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and grants. It all sort of took off from there”.

Tisha enjoys learning and challenging herself. Pursuing the CPCPM certificate was a great way for her “to brush up on aspects of contracting” she doesn’t use on a daily basis while managing contracts and grants at SDSU. It is Tisha’s intention to continue her contracting management education by attending future training seminars and conferences, which will help earn her the needed CPEs to maintain her CPCPM certification. Obtaining another NCMA certificate could most certainly be on the horizon for Tisha. Tisha’s future looks bright and is full of endless contracting management opportunities.

In her spare time Tisha enjoys “traveling, drinking wine and spending time with my husband and mini-Australian Shepard, Chloe.”

A major part of NCMA’s mission is education and professional development. The San Diego, CA Chapter offers several educational opportunities to assist and encourage individuals interested in a career in contracts management. The Ernest “Dean” Menard scholarship program is one of the many

benefits offered as a NCMA member with the San Diego, CA Chapter. More information about educational opportunities through the NCMA San Diego, CA Chapter can be found at <http://www.ncmasd.org/education.html>.

The NCMA San Diego, CA Chapter would also like to congratulate the following individuals for passing the paper certificate exam in 2017: Susan Greenberg (CPCM), Al Stark (CPCM & CFCM), Melissa Caudillo (CPCM & CFCM), Gary Cosman (CPCM), Troy Terpening (CFCM), and Kristi Stoddart (CFCM). For those of you who have taken and passed a NCMA certificate exam at a Kryterion Learning Center, our Education Department would love to hear from you.

For all educational opportunity related information, questions, comments, or suggestions please e-mail the current Director of Education, Kristy Schultz, at education@ncmasd.org.

***Officer Election for 2018–19 Program Year
By Maurice Caskey, CFCM, CCCM, Fellow***

The Election Committee is pleased to announce the results of the election of officers for the NCMA San Diego Chapter 2018–19 program year. The Committee also wants to extend its thanks and appreciation for those who served in these positions for the current year. Congratulations to the following will take office on July 1, 2018, to serve terms through June 30, 2019:

President	Kristy Schultz [current Education Director]
Vice President	Jill Haynie [current Secretary]
Secretary	Kim Hang
Treasurer	Michelle Foley
Arrangements	Reina Bergfors [current College Outreach chair]
Education	Carolynn Bundy
Membership	Dianne Cherniak [current Arrangements Director]

Please welcome these officers in their new positions. We’re sure you’ll provide them your full support through the coming program year.

Interested in Becoming a NCMA Member?

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If you are interested in serving the Chapter in one of the appointed committee chair positions, see the duties of each position at http://www.ncmasd.org/images/20140327_BOD_Duties_Responsibilities.pdf. Contact Kristy Schultz or Jill Haynie and let them know of your interest. This is a great way to become more involved with the Chapter and start serving on the Chapter Board.

NCMA Member Anniversary Recognition
By: Lucy Robelin, CFCM – Membership Director

Each year the Chapter recognizes those who have 5 years or more of membership in NCMA. In 2018 we will have 53 total members with 5-year milestone anniversaries. We'd like to congratulate the following on their membership and service to NCMA throughout their careers. We thank you for being loyal NCMA San Diego Chapter members.

45 years!

Michael Tashjian, CPCM, Fellow

35 years:

James Buchanan, CPCM
Dennis Sato

John Pellegrino, CPCM, Fellow
L. Carter

James Lagos

30 years:

William Saputo
Daniel Uglietta

Robert Clark
Mary O'Hara, CPCM

Maurice Caskey, CFCM, CCCM, Fellow

25 years:

Kathy ZuaZua
Melanie Swift

Robert Kedney
Catheran Brown

Lisa Dwyer

20 years:

Laura Kivi
Kim Goldfine, CFCM

Cindy Nye
Jacqueline Todd

David Young, CFCM

15 years:

Susan Greenberg, CPCM

Byron Hanchett, CPCM

Quyen Tran, CPCM, CFCM, CCCM

10 years:

Elizabeth Naiman
Wayne Watson
Helena Zajac

Michael Andranovich
Helen Lum

Dorothy Lorenz
Lucy Robelin, CFCM

5 years:

Amador Estrada, CPCMDiane Santos

Geoffrey Vance
Julia Yang
Rochelle Cracchiolo
Linda Totanes
Bhavini Kapadia, CCCM
Amanda Fales, CFCM
Martha Miller

Ted Bonanno, CPCM
Theresa (Teri) Wilt
Christopher Streicher, CFCM
Patrick McClean
Albert Pisacane
Belinda Williamson
Gary Cosman, Jr., CPCM

Erik Putz
Sheila O'Brien
Josefina Lara-Puente
Robyn Dunn, CFCM, CCCM
Linda Dattilo
Derek Andrews

These members were recognized at the April seminar.

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2017-2018 NCMA-SD Board of Directors



Dan Chalfant, CPCM
President
President@ncmasd.org



Nalani Moore, CFCM
Vice President
Vice-
President@ncmasd.org



Jill Haynie
Secretary
Secretary@ncmasd.org



Heather Jenkins
Treasurer
Treasurer@ncmasd.org



Dianne Cherniak
Arrangements Director
Arrangements@ncmasd.org



Kristy Shultz
Education Director
Education@ncmasd.org

Lucy Robelin
Membership Director
Membership@ncmasd.org



Theresa Robinson Harris
Immediate Past President
Chapter-
Advisors@ncmasd.org

**2017 – 2018FI
NCMA-SD Advisors & Chairpersons**



Brian Greenberg, Fellow, CPCM
**Chapter Advisor & CART Chair
(Carlsbad)**
Chapter-Advisors@ncmasd.org

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Kim Hang
Outreach Co-Chair -College
Outreach-College@ncmasd.org

DoD Liaison & Chapter Advisor
dodliaison@ncmasd.org

Chris Powell
Employment
Employment@ncmasd.org



Maurice Caskey, Fellow,
CFCM, CCCM
Fellows & Awards
fellow@ncmasd.org



Kimberly Jacobs
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Reina Bergfors
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Tammie Rippie
Chapter Business Outreach Volunteer
Outreach-SB-Military@ncmasd.org



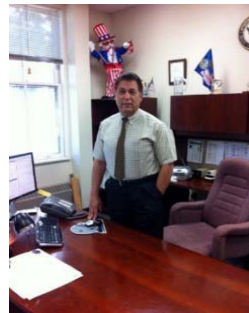
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Melissa Caudillo
Social Media Chair
Socialmedia@ncmasd.org



Quyen Tran, CPCM,
CFCM, CCCM
Website Chair
Website@ncmasd.org



Gabe Olivas
CART Chair (San Diego)
CART@ncmasd.org

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Membership Application

fill out and return the completed registration form and payment to NCMA, PO Box 758747, Baltimore, MD 21275-8747; fax your completed form to 703/448-0939; or call toll-free 800/344-8096. Make checks payable to NCMA.



Join NCMA Today and Receive

- 12 months of *Contract Management* magazine,
- CMNews and legislative updates,
- Chapter affiliation and local networking opportunities,
- *Journal of Contract Management*,
- *Contract Management Resource Directory*, and
- Discounts on NCMA events, certification, and products.



Business Success Through Contract Management Excellence

Please list both home and business addresses and indicate your mailing preference:

Home Business

Home Address

Mr. Mrs. Ms. Other _____

NAME _____

UNIVERSITY (IF APPLICABLE) _____

ADDRESS _____

APT# _____

CITY/STATE _____ ZIP _____

TELEPHONE _____

E-MAIL _____

Business Address

ORGANIZATION _____

TITLE _____

ADDRESS _____

MAIL STOP/ROOM NUMBER/ETC. _____

CITY/STATE _____ ZIP _____

TELEPHONE _____

FAX _____

E-MAIL _____

WEB SITE _____

Chapter Preference (optional)

Membership Type

New Member/One-Year—\$175

New Member/Two-Year—\$310

New Member/Three-Year—\$430

(Includes \$25 initiation fee.)

Member Pro Vita—\$1250

Renewal Member/One-Year—\$150

Renewal Member/Two-Year—\$285

Renewal Member/Three-Year—\$405

Student Member/One-Year—\$35

This membership is for those individuals who are full-time students in an accredited, degree-granting institution, and do not hold full-time employment in contract management or a related field.

New Professional Member/One-Year—\$110

Includes one-time \$25 initiation fee. This membership is for those individuals who are age 33 or younger on the date of their join or renewal date. New Professionals must list date of birth: _____.

Renewal New Professional Member/One-Year—\$85

New Professionals must list date of birth: _____.

Retired Member/One-Year—\$65

Individuals who are neither employed nor self-employed, and are current members of NCMA.

Payment Method

Check enclosed for \$ _____

Charge my credit card for:

American Express Discover

Mastercard VISA

ACCOUNT # _____ EXP. DATE _____

SIGNATURE _____

NAME ON CARD _____

NMI2016

PROMOTION CODE (optional) _____

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Code of Ethics

Section One: Preamble

The Code of Ethics of the National Contract Management Association (NCMA) establishes principles for members of the contract management profession. This code is intended to create public trust and confidence in the integrity of the contract management process. The code requires members of the contract management profession to conduct themselves in such a manner as to bring credit upon the profession. All members of NCMA shall abide by the letter and spirit of this code.

Section Two: General Obligations

Integrity:

Members fulfill their duties without deception or misleading practices. Members actively support and encourage others in adhering to this code.

Accountability:

Members accept responsibility for their own conduct and performance.

Good faith:

Members conduct all business in good faith, make any required disclosures, and avoid actual or apparent conflicts of interest (whether by reason of a financial interest, family relationship, or any other circumstances).

Professionalism:

Members make themselves knowledgeable on all aspects of the contracting profession, and apply this knowledge to the best of their ability to serve their employers, customers, clients, business partners, and the public interest. This includes sharing one's knowledge and experience to contribute to the development of the profession. Members provide objective advice free from improper influence.

Confidentiality:

Members protect confidential information concerning the business affairs of any present or former employer, governmental agency, business partner, or public body on which they serve.

Compliance with laws:

Members comply with all laws and regulations governing contract management activities in all jurisdictions in which they conduct business.

Trust:

Members conduct themselves in such a manner as to establish and maintain trust and confidence in the integrity of the contract management process.

Respect:

Members are respectful of others in the conduct of their professional duties.

Section Three: Obligations to the Profession

Professional reputation:

Members avoid disparaging statements affecting the professional reputation of other contract management professionals. Members act so as to bring credit upon the profession and the association.

Mutual accountability:

Members hold each other accountable for compliance with this code.

Professional development:

Members keep informed of developments in the contract management field to maintain knowledge, skill, and professional competence.

Advancement by qualification:

Members encourage hiring and promotion within the contract management profession based upon an individual's professional qualifications.

Professional qualifications and certification:

Members make only truthful claims concerning professional qualifications, certification status, or experience. Members use any professional certification or designation only in accordance with the practice and rules of NCMA or other certifying or granting body that granted the certification or designation.

Section Four Obligations to the Association

Service:

Members offer service to the association willingly, including serving in chapter and national offices without compensation, in order to advance the profession of contract management.

Violations:

Members report any suspected violations of this code to an official of NCMA at the appropriate level (chapter or national). Violations of this code are subject to discipline in the judgment of NCMA up to, and including, revocation of membership and certification. Members shall not retaliate in any form against anyone who raises a valid concern under this code.

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Why was CART created?

In the spirit of continued education, career growth, and sharing collective expertise, the San Diego Chapter established the Contract Administrator's Round Table (CART) forum.

What is the main goal of CART?

The primary objective of CART meetings is to provide contract professionals a forum to ask any question, present any situation/problem, share a lesson learned, and get an answer or feedback from a variety of viewpoints.

Who may attend CART meetings?

Whether you are brand new in the contracts field or have 20+ years of experience, we invite you to share your questions, problems and knowledge with your fellow NCMA members so that we can all learn, grow, and excel in our jobs. Everyone (all members) is invited to attend. All that is asked of you is that you bring at least one (1) question, or issue or lesson learned to the table.

Why should YOU attend the next CART meeting?

The role of the "Contracts Professional" is changing. In the wonderful world of Contract Management, there are multiple solutions to a single problem and multiple problems created by a single solution. The CART forum provides you one venue in which to ask questions and obtain timely answers. This forum is an excellent choice for improving your knowledge of contract management and also for developing networking and mentoring relationships.

San Diego CART

WHEN: 2nd Wed of each Month 7:30-8:30am

COST: Free, including pastries and coffee

WHERE: KES, Inc. (KEARNY MESA) 7807 Convoy Court, Suite 200 SAN DIEGO, CA 92111

Parking: Please park on the street, if available.

RSVP: Mark Cook, at mark@kes.com or Gabe Olivas gabe.olivas@navy.mil. Gabe's telephone: (619) 221-5487.

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