

# NCMA NEWS

*San Diego Chapter*



September 2014  
Volume 10 Issue 1

<http://www.ncmasd.org>

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## President's Message

*By Theresa Robinson, CPCM/President*

Dear Members,

The 2014–15 San Diego Chapter Board of Directors was installed in July. I am pleased and honored to begin my term as your president. The Board was strengthened by several new members and quickly got to work. We had our annual planning meeting in July to discuss how to make this program year even better than last year's. Many great ideas were discussed and several decisions were made on scheduling the program year's workshops and seminars. It is clear that the Board's enthusiasm continues to grow and it is especially gratifying to be working with an extraordinary Board that has enormous energy and passion for serving our members and for advancing the contract management profession.



Here are the highlights of the educational training opportunities that we have planned for 2014–15. A 2-part seminar on contract changes will be held in October & November 2014. It will focus on the changes clauses and requirements of other clauses that trigger change and will provide tips on how to avoid scope creep, as well as managing constructive changes and equitable adjustments. A second 2-part seminar will cover the FAR in April & May 2015. It will help demystify the FAR and is highly recommended if you plan on taking either the CPCM or CFCM certification exams offered by NCMA. I encourage you to visit our website at <http://www.ncmasd.org/> to explore the range and quality of the training events that now are scheduled, with more to come. Please share this information with your colleagues and co-workers who might benefit from it. Also, check the calendar of events on a regular basis as we frequently update it as new events such as webinars become available.



As usual, we welcome your feedback if you have ideas or recommendations on how we can serve you better. Please do not hesitate to reach out to me or any of the other Board members. All contact information is available on the chapter website at <http://www.ncmasd.org/directorschairs.html>. I'm excited to get started and look forward to the year ahead working with the dedicated volunteers supporting a talented and diverse group of contract management professionals. See you at our September workshop that will feature Jon G. Western who will present "ID/IQ Contracting, the Good, the Bad, and the Ugly," an informative discussion of the benefits and pitfalls of Indefinite Delivery/Indefinite Quantity (ID/IQ) contracts!

## Top 40 Under 40 in NCMA

*By Jim Southerland, CPCM, Fellow/Chapter Advisor*



Quyen was selected by NCMA as one of the top 40 contracting professionals under 40 in NCMA in 2014.

The NCMA Top Professionals Under 40 in Contract Management Award was established in 2012 to provide peer recognition to the rising stars and top performers in the contract management profession under the age of 40. These professionals, who are the future of contract management, come from the ranks of academia, government, and industry.

Quyen is a former President of the San Diego chapter of NCMA and is a continuing active chapter supporter as Chapter Advisor and contributor to chapter activities in all areas, program development,

communications and website improvements, and outreach to NCMA National leadership and other programs.

Since joining NCMA in 2002, Quyen has risen through the ranks of San Diego chapter offices including arrangements, education, vice president and president. She is now a chapter advisor as a former past president.

Quyen has progressed as a chapter leader and as an outstanding example of growth in her knowledge and involvement in contract management. Her ability to complete tasks complementing chapter plans and her attendance at industry and NCMA training, self-improvement and leadership programs is outstanding. Her support of NCMA programs for training and leadership has been constant.

Quyen is the holder of professional designations from NCMA including CPCM, CFCM, and CCCM. This 40 under 40 designation is well deserved; NCMA fellow is close behind.

**Interested in Becoming a NCMA Member?**

Go to [www.ncmahq.org](http://www.ncmahq.org) to learn more about membership benefits and dues.



NATIONAL CONTRACT MANAGEMENT ASSOCIATION

## Featured Member

### Meet Jackie Peluso, 2014-2015 Arrangements Director.

Prior to working in the government accounting and contract industry, Jackie worked as an Accountant and Bookkeeper for 8 years for small firms in the industries of Business Management CPA firms, Commercial Real Estate and Property Management, and 2 plus years at public CPA firms doing tax and audit. She grew tired of doing routine accounting work and always knowing what work was in front of her to be done every day, eventually asking herself “What’s next?”



She moved to San Diego from San Francisco and joined her mother Diane Peluso at DMP consulting in 2011 with the promise that she would never get bored. Jackie Peluso is now a Senior Consultant with DMP Consulting, a consortium of Consultants who possess expertise and in-depth knowledge in Government Contracts, Grants, Accounting, Proposals and Auditing. Jackie is now doing government accounting and audits, contract management, and proposal work for mostly small business government contractors and loves the broad range of work that is required and always changing. Since the career change, she enjoys the people she is surrounded by and benefits from helping her small business clients stay in business and grow. She enjoys being part of a family business and being a part of NCMA where people can get together and discuss current issues in the industry, helping one another tackle common road blocks thrown at contractors by the government and DCAA. She became an active member of NCMA in 2013 attending NCMA seminars and courses.

In her spare time, she enjoys hiking, diving, cycling, golfing and the occasional skydive. Jackie has also taken courses in Government Contract Audits, Cost and Price Analysis, DFARS Accounting System Compliance and will continue to attend such courses to continue her knowledge in what is now, the most interesting job she has ever had!

## Small Business and Government Outreach

*By Tammie Rippie/Outreach - Small Business & Government*

The NCMA San Diego Chapter wants the local small businesses to get involved. We offer resources to small businesses by reaching out to various professional organizations and act as a liaison to promote workshops or seminars for the benefit of Small Business. Pursuing government contracts can be challenging, but doing business with the government is a big step to growing a small business. The NCMA workshops and seminars are informative, educational and directly related to contracting activities within the military contracting administration.

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## Special Election

*By Quyen Tran, CPCM, CFCM, CCCM/Chapter Advisor*

The NCMA San Diego Chapter would like to thank all the members who voted in the recent special election for an open position on the Board of Directors for program year 2014–15. Congratulations to Lee Davis, who is the newly elected Education Director! We look forward to Lee’s enthusiastic support of the Chapter in this vital role providing for many of your education and training needs.



## San Diego Chapter to Host Certification Exams

*By Quyen Tran, CPCM, CFCM, CCCM/Chapter Advisor*

The NCMA San Diego Chapter will host the certification examinations for Certified Professional Contracts Manager (CPCM), Certified Federal Contracts Manager (CFCM), and Certified Commercial Contracts Manager (CCCM) on November 8, 2014, at 9AM at KES, 9325 Sky Park Court, Suite 300, San Diego, CA 92123. The Chapter hosted exams will use a paper format instead of the on-line computer-based format. Using the “hard copy” format avoids the need to pay a third party a fee to take the examination.

The NCMA Certification Department will accept applications and fees from candidates until 45 days prior to the exam date, which is a deadline of September 23. Only candidates who have approved applications and who have paid the application fee and the exam fee will be allowed to sit for the exams. The cost is \$50 for members and \$90 for nonmembers. There will be no walk-ins. The Certification Department will notify candidates of their eligibility within 15 working days of receipt of complete applications and fees. Candidate can visit the NCMA website at <http://www.ncmahq.org/ProfessionalDevelopment/content.cfm?ItemNumber=6086&&navItemNumber=9985>, or call the Certification Department at 1-800-344-8096, or e-mail the Certification Department at [certification@ncmahq.org](mailto:certification@ncmahq.org) for any questions.

Once approved by the Certification Department, please provide an email to the San Diego Chapter Education Director, Lee Davis, at [Education@ncmasd.org](mailto:Education@ncmasd.org), to let him know which exam you’ll be taking. Good luck!

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## CART Meetings



What are CART Meetings? The acronym CART stands for "Contract Addministrators' Round Table." The San Diego chapter conducts CART meetings year round on the second (in Kearny Mesa) and fourth (in North County) Wednesdays of each month. The concept is that members get together to discuss contracting topics. Participants are not required to bring a question for discussion but should feel free to do so. Please remember CART discussions are "off-the-record", not for attribution.

### San Diego CART

**WHEN:** 2<sup>nd</sup> Wed of each Month, 7:30-8:30am  
**COST:** Free, including pastries and coffee  
**WHERE:** KES, 9325 Sky Park Court, Suite 300,  
San Diego, 92123  
**RSVP:** [mark@kes.com](mailto:mark@kes.com)

### North County CART

**WHEN:** 4<sup>th</sup> Wed of each Month noon – 1pm  
**COST:** Free, lunch is provided  
**WHERE:** ViaSat Inc., 6155 El Camino Real,  
Carlsbad, CA 92009  
**RSVP:** [brian.greenberg@viasat.com](mailto:brian.greenberg@viasat.com)



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## Events/Seminars/Webinars/Workshops

### Past and Upcoming Events

#### **“Contracting in the Commercial Environment”**

*By Mike Oberski/Community Service Chair*

The June seminar was presented by an experienced panel of legal and executive leadership professionals on the subject of understanding commercial contracting. Our NCMA chapter was pleased to have Patrick Monroe, Legal Counsel from Best Best & Krieger; Mariel Estigarribia, Legal Counsel from Klinedinst; and Karla Pinckes, Legal Counsel and Business Contracts Manager from the Ken Blanchard Executive leadership team.

After a very thorough introduction by our own Jim Southerland, each speaker provided their insight into the business and legal implications of commercial contracting. The range of topics touched upon the use of Uniform Commercial Code, identifying a business entity in the state of California, contract provisions that have both commercial and US Government contracting impact. We looked at best commercial practices and reasons why a company might want to cross over to commercial contracting. One reason might be that venturing into commercial contracting would make your business a better acquisition candidate.

From a slightly different perspective, Karla shared with us tools and communication systems that are maintained by the Blanchard companies. For those not familiar with Ken Blanchard, he is cofounder and coauthor of numerous leadership development programs. As stated by one of the seminar attendees, Steve Purcell, “...a different look at how another type of business is run, fascinating.”

Although the group size was relatively small for this early summer time event, most folks felt that the topic covered was more relevant than advertised and may be worth bringing these speakers back again in the future.



*Mariel Estigarribia, Legal Counsel, Klinedinst PC*



*Karla Pinckes, Legal Counsel and Business Contracts Manager,  
Ken Blanchard Executive leadership team*

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NATIONAL CONTRACT MANAGEMENT ASSOCIATION

# ID/IQ Contracting

## The Good, the Bad, and the Ugly

presented by:

**Jon G. Wester**

**Contracts Branch Head Code 2.1.4 SPAWAR**

Indefinite Delivery/Indefinite Quantity (ID/IQ) contracts can provide your company with a flexible contract vehicle to go after various related orders without a lot of negotiating. ID/IQs can be Multiple Award Contracts (MACs) Government Wide Acquisition Contracts (GWACs), SeaportE type, or Single Award contracts. They can have Delivery Orders or Task Orders. They can be very profitable or a burden to the contractor. Aggressive marketing and efficient subcontract management is the key to a successful ID/IQ contracting experience.



**Date:** Wednesday, September 17, 2014



**Time:** 11:30am to 1pm  
 Registration and Networking at 11:30am  
 Presentation Commences Promptly at 12 noon



**Location:** Four Points by Sheraton  
 8110 Aero Drive  
 San Diego, CA 92123



**Cost:** \$40 for NCMA Members  
 \$50 for Non-Members



**How to Register and Pay:** **The registration deadline is Friday, September 12.**  
 Register online at [www.ncmasd.org](http://www.ncmasd.org) or email the attached registration form to [Arrangements@ncmasd.org](mailto:Arrangements@ncmasd.org). Payment may be made at the door or by PayPal. Please see details on the registration form.

**Interested in Becoming a NCMA Member?**

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# Registration Form

for

## ID/IQ Contracting The Good, the Bad, and the Ugly

**Date:** Wednesday, September 17, 2014

**Time:** 11:30am to 1pm

**Location:** Four Points by Sheraton  
8110 Aero Drive  
San Diego, CA 92123

**Cost:** \$40 for NCMA Members  
\$50 for Non-Members

**The registration deadline is Friday, September 12.**

### How to Register



Register online at  
[www.ncmasd.org](http://www.ncmasd.org)

OR



Email this completed form to  
[Arrangements@ncmasd.org](mailto:Arrangements@ncmasd.org)

### How to Pay

Pay at the door via cash, check  
or credit card



OR

Pay with credit card  
via PayPal (preferred)



**Checks:** Make payable to "National Contract Management Association – San Diego Chapter." Checks must be for US funds only.

**Credit:** NCMA San Diego accepts Visa, MasterCard, Discover and American Express.

**Money Order's and Travelers Checks:** NCMA San Diego does not accept money orders or traveler's checks.

**The Chapter is charged for those who register but do not attend; therefore, all no shows will be billed.**

**If you don't receive confirmation of registration within three business days please contact: [jackie@dmpconsulting.net](mailto:jackie@dmpconsulting.net).**

### Participant Information

**Contact Information:**

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Organization: \_\_\_\_\_

Phone: \_\_\_\_\_

**Amount Payable:**

\$40 for NCMA Members

Membership No. \_\_\_\_\_

(please indicate membership status)

\$50 for Non-Members

**Payment Made:**

Check in Advance

At the Door

Online

(please check payment method)

**Meal Choice:** (please select one)

(all meals are served with a side salad, dessert and beverage)



Herb Pork Loin: Herb crusted pork loin with porcini mushrooms & roasted tomato demi-glaze, marble roasted potatoes and fresh seasonal vegetables



Roasted Eggplant Tower: Portobello mushroom, eggplant, zucchini, spinach, red onions, roasted tomatoes on a bed of spinach and arrabiata sauce



Glazed salmon filet: with ginger apple chutney, sweet potato and sautéed spinach

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NATIONAL CONTRACT MANAGEMENT ASSOCIATION

### AUGUST 2014 – JUNE 2015 CALENDAR OF EVENTS

Workshops			
Date & Time	Location	Topic	Guest Speaker(s)
Wed., September 17 11:30am – 1:00pm	Sheraton Four Points	ID/IQ Contracting The Good, the Bad and the Ugly	Jon Wester, Contracts Branch Head SPAWAR
Wed., January 21 11:30am – 1:00pm	San Diego County Office	County and City Governments Contracting Requirements	Jack Pellegrino, Director of Contracts
Wed., February 18 11:30am – 1:00pm	Sheraton Four Points	Trends in DoD Contracting (SPAWAR)	Captain Armstrong, SPAWAR

Seminars			
Date & Time	Location	Topic	Guest Speaker(s)
Wed., October 15 8:30am – 11:30am	Sheraton Four Points	Changes Part 1, Requirements	Jim Southerland, NCMA Fellow
Wed., November 19 8:30am – 11:30am	Sheraton Four Points	Changes Part 2, Definitization	Jim Southerland, NCMA Fellow
Wed., March 18 8:30am – 11:30am	Sheraton Four Points	AGA Joint Meeting/Audit/Cost Issues	TBD
Wed., April 15 8:30am – 11:30am	Sheraton Four Points	FAR Seminar 1, Parts 1-30	Jim Southerland, NCMA Fellow
Wed., May 20 8:30am – 11:30am	Sheraton Four Points	FAR Seminar 2, Parts 31-53	Jim Southerland, NCMA Fellow

Webinars			
Date & Time	Location	Topic	Presenters
TBD	TBD	TBD	TBD

Contractor Administrator's Round Table (CART)				
Date	Time	Location	Host and RSVP POC	Notes
Wed. August 13	7:30am – 8:30am	KES, Kearney Mesa	Mark Cook	
Wed. September 10	7:30am – 8:30am	KES, Kearney Mesa	Mark Cook	
Wed., September 24	12:00pm – 1:00pm	ViaSat, Carlsbad	Brian Greenberg	Lunch is provided
Wed. October 8	7:30am – 8:30am	KES, Kearney Mesa	Mark Cook	
Wed., October 29	12:00pm – 1:00pm	ViaSat, Carlsbad	Brian Greenberg	Lunch is provided
Wed. November 12	7:30am – 8:30am	KES, Kearney Mesa	Mark Cook	
Wed. December 10	7:30am – 8:30am	KES, Kearney Mesa	Mark Cook	
Wed. January 14	7:30am – 8:30am	KES, Kearney Mesa	Mark Cook	

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## AUGUST 2014 – JUNE 2015 CALENDAR OF EVENTS

Contractor Administrator's Round Table (CART)				
Date	Time	Location	Host and RSVP POC	Notes
Wed. January 28	12:00pm – 1:00pm	ViaSat, Carlsbad	Brian Greenberg	Lunch is provided
Wed. February 11	7:30am – 8:30am	KES, Kearney Mesa	Mark Cook	
Wed. February 25	12:00pm – 1:00pm	ViaSat, Carlsbad	Brian Greenberg	Lunch is provided
Wed. March 11	7:30am – 8:30am	KES, Kearney Mesa	Mark Cook	
Wed. March 25	12:00pm – 1:00pm	ViaSat, Carlsbad	Brian Greenberg	Lunch is provided
Wed. April 8	7:30am – 8:30am	KES, Kearney Mesa	Mark Cook	
Wed. April 22	12:00pm – 1:00pm	ViaSat, Carlsbad	Brian Greenberg	Lunch is provided
Wed. May 13	7:30am – 8:30am	KES, Kearney Mesa	Mark Cook	
Wed. May 27	12:00pm – 1:00pm	ViaSat, Carlsbad	Brian Greenberg	Lunch is provided
Wed. June 10	7:30am – 8:30am	KES, Kearney Mesa	Mark Cook	

Board of Directors Meetings			
Date	Time	Place	Please RSVP To
Wed., Aug. 6	7:30am – 8:30am	TREVET	<a href="mailto:president@ncmasd.org">president@ncmasd.org</a>
Wed., September 3	7:30am – 8:30am	TREVET	<a href="mailto:president@ncmasd.org">president@ncmasd.org</a>
Wed., October 1	7:30am – 8:30am	TREVET	<a href="mailto:president@ncmasd.org">president@ncmasd.org</a>
Wed., November 5	7:30am – 8:30am	TREVET	<a href="mailto:president@ncmasd.org">president@ncmasd.org</a>
Wed., December 3	7:30am – 8:30am	TREVET	<a href="mailto:president@ncmasd.org">president@ncmasd.org</a>
Wed., January 7	7:30am – 8:30am	TREVET	<a href="mailto:president@ncmasd.org">president@ncmasd.org</a>
Wed., February 5	7:30am – 8:30am	TREVET	<a href="mailto:president@ncmasd.org">president@ncmasd.org</a>
Wed., March 5	7:30am – 8:30am	TREVET	<a href="mailto:president@ncmasd.org">president@ncmasd.org</a>
Wed., April 2	7:30am – 8:30am	TREVET	<a href="mailto:president@ncmasd.org">president@ncmasd.org</a>
Wed., May 7	7:30am – 8:30am	TREVET	<a href="mailto:president@ncmasd.org">president@ncmasd.org</a>
Wed., June 4	7:30am – 8:30am	TREVET	<a href="mailto:president@ncmasd.org">president@ncmasd.org</a>

Other Events			
Month	Event	Location	Notes
December	Member Holiday Party	TBD	

## Interested in Becoming a NCMA Member?

Go to [www.ncmahq.org](http://www.ncmahq.org) to learn more about membership benefits and dues.



#### Important Notes

**More Information:** Updated and additional information for each of the above events is posted on the NCMA San Diego Chapter website at [www.ncmasd.org](http://www.ncmasd.org).

**Event Registration:** For workshops, seminars and webinars, a notice will be posted on the website and participants may register online starting about four weeks before the event.

**CART Meetings:**

- For CART meetings at KES please RSVP to Mark Cook, p: 858.292-0922 x221, e: [mark@kes.com](mailto:mark@kes.com)
- For CART meetings at ViaSat please RSVP to Brian Greenberg, p: 760.476.4117, e: [Brian.Greenberg@viasat.com](mailto:Brian.Greenberg@viasat.com)
- For CART meetings held at ViaSat, lunch will be provided.

**Board Meetings:** Board meetings are open to any member that desires to attend and observe. Please RSVP.

#### Event Locations

Four Points by Sheraton	KES Inc.	Trevet, Inc.	ViaSat, Inc.
8110 Aero Drive San Diego CA 92123	9325 Sky Park Ct., Ste. 300 San Diego CA 92123	9888 Carroll Centre Rd. San Diego, CA 92126	6155 El Camino Real Carlsbad, CA 92009

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NATIONAL CONTRACT MANAGEMENT ASSOCIATION

## 2014 – 2015 NCMA-SD Board of Directors



Theresa Robinson Harris, CPCM  
**President**  
[President@ncmasd.org](mailto:President@ncmasd.org)



Dan Chalfant  
**Vice President**  
[Vice-President@ncmasd.org](mailto:Vice-President@ncmasd.org)



Thomas Salyers  
**Secretary**  
[Secretary@ncmasd.org](mailto:Secretary@ncmasd.org)



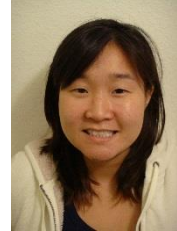
Joni Shirley, CPCM  
**Treasurer**  
[Treasurer@ncmasd.org](mailto:Treasurer@ncmasd.org)



Jackie Peluso  
**Arrangements Director**  
[Arrangements@ncmasd.org](mailto:Arrangements@ncmasd.org)



Lee Davis, CPCM  
**Education Director**  
[Education@ncmasd.org](mailto:Education@ncmasd.org)



Sarah Ahn, CPCM  
**Membership Director**  
[Membership@ncmasd.org](mailto:Membership@ncmasd.org)



Mark Cook  
**Immediate Past President**  
[Chapter-Advisors@ncmasd.org](mailto:Chapter-Advisors@ncmasd.org)

## 2014 – 2015 NCMA-SD Advisors & Chairpersons



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



Lee Davis, CPCM  
**Chapter Advisor**  
[Chapter-Advisors@ncmasd.org](mailto:Chapter-Advisors@ncmasd.org)



James Southerland,  
Fellow, CPCM  
**Chapter Advisor**  
[Chapter-Advisors@ncmasd.org](mailto:Chapter-Advisors@ncmasd.org)



Quyen Tran, CPCM,  
CFCM, CCCM  
**Chapter Advisor**  
[Chapter-Advisors@ncmasd.org](mailto:Chapter-Advisors@ncmasd.org)

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## 2014 – 2015 NCMA-SD Advisors & Chairpersons



Gabe Olivas  
**CART Chair (San Diego)**  
[CART@ncmasd.org](mailto:CART@ncmasd.org)



Mike Oberski  
**Community Service**  
[Community-Service@ncmasd.org](mailto:Community-Service@ncmasd.org)



Captain Stephen E. Armstrong  
**DoD Liaison**



Christine Powell  
**Employment**  
[Employment@ncmasd.org](mailto:Employment@ncmasd.org)



Maurice Caskey,  
 Fellow, CFCM, CCCM  
**Fellows & Awards**



Shawna Jones, CPCM,  
 ICCM-F  
**Newsletter Editor**  
[Newsletter@ncmasd.org](mailto:Newsletter@ncmasd.org)



Reina Bergfors  
**Outreach Chair - College**  
[Outreach-College@ncmasd.org](mailto:Outreach-College@ncmasd.org)



Tammie Rippie  
**Outreach Chair - Small Business, Military & Government**  
[Outreach-SB-Military@ncmasd.org](mailto:Outreach-SB-Military@ncmasd.org)



Victoria Marin  
**Publicity Chair**  
[publicity@ncmasd.org](mailto:publicity@ncmasd.org)



Lisa Schneeloch  
**Website Administrator**  
[Website@ncmasd.org](mailto:Website@ncmasd.org)

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