

# NCMA NEWS

*San Diego Chapter*



June 2013  
Volume 8 Issue 4

<http://www.ncmasd.org>

## President's Message

This is my last President's Message for this program year. It has been a privilege and pleasure to serve the San Diego Chapter for the 2012–13 program year and I look forward to serving the Chapter next year.



To summarize our program year; we've had several great seminars and workshops at a very low cost to our members. We've hosted four webinars that were free to our members. KES and ViaSat have hosted monthly Contract Administrator's Round Table (CART) meetings, free of charge to all attendees. We also teamed with Deltek to present the Surviving Sequestration Road Tour in April. We hosted a social in December and had our first and very successful Toys for Tots drive! You, the Chapter members, donated many toys to make many less fortunate military children very happy during the holidays.

Many outstanding professionals attended our events throughout the year, and I'd like to thank you all for supporting our events. Our chapter is successful only because of the volunteers. I'd also like to sincerely thank each and every one of the Board, because our success is based on your efforts, thank you! And a special thank you to our speakers, all of whom gave up their time to help educate our chapter.

Congratulations to the newly elected officers and I look forward to working with each of you during the next program year!

- President: returning, Mark Cook
- Vice President: returning, Theresa Robinson
- Treasurer: returning, Joni Shirley
- Secretary: Thomas Salyers
- Education Director: Courtney Kappel
- Membership Director: Nalani Moore
- Arrangements Director: Dianne Cherniak

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The following committee Chairs are needed to serve to commence serving at our July planning meeting:

1. CART (Carlsbad)
2. CART (Kearny Mesa)
3. Community Service
4. Employment
5. Newsletter
6. Outreach (College)
7. Outreach (Small Business & Government)
8. Publicity
9. Scholarships
10. Website
11. Fellows

Please visit our website for position descriptions, or send me an email at [president@ncmasd.org](mailto:president@ncmasd.org) and let me know if you would like to participate next year, and in what capacity (please attach your bio if not already serving on the Board). The elected officers, various Chairs and the advisors make up the Board. My goal is to have all positions filled by June 30, 2013. Therefore, if you're interested in a position please let me know by June 24, 2013.

We will begin our new year on July 3 with the first of two planning meetings. If you have a specific topic for a workshop or seminar, or an idea for a speaker for a specific topic, or an idea for a social event or project, we'd love to hear from you before we start planning for the next year. If you'd like to be a speaker at one of our events, we'd particularly like to hear from you.

As part of our mission, we want to ensure we are providing you, our members, with what you want and need to more effectively perform your job in contract management. Your inputs help us learn what you like or dislike regarding our programs and services. Any other comments or suggestions to improve the Chapter are welcome, too. Without this invaluable feedback, we simply can't maintain the level of excellence you've come to expect from the San Diego Chapter. You can keep up to date on all Chapter activities by visiting us at our website, <http://ncmasd.org/> to check for updates and new information!

San Diego Mayor Bob Filner has proclaimed the week of July 21 – July 27, 2013, to be "Contract Management Week, in the City of San Diego" in recognition of the contributions that the thousands of contract managers make to the economy and quality of life in San Diego. Thank you and congratulations!

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Presented By  
Mayor  
Bob Filner

# The City of San Diego Proclamation

## *Contract Management Week*

**WHEREAS**, during the week of July 21- July 27, 2013, the National Contract Management Association's (NCMA) Board of Directors will gather to recognize the dedication of contracting and procurement professionals; and

**WHEREAS**, the NCMA was founded in 1959 as the National Association of Professional Contract Administrators; and

**WHEREAS**, NCMA enables its members to develop professionally by offering an accredited certification program and access to a diverse contract-management community of practices; and

**WHEREAS**, NCMA also enables organizations to advance their goals by providing resources for best practices and standards; and

**WHEREAS**, a large number of conferences are sponsored nationally by NCMA, with the World Congress being its premier annual event that focus on the needs and challenges of the federal and commercial contracting industry; and

**WHEREAS**, the Contract Management Leadership Development Program (CMLDP) was created by the NCMA to address one of the contract-management industry's greatest challenges of a retiring workforce without replacement; and

**WHEREAS**, the local San Diego Chapter conducts meetings, workshops, seminars, and luncheons, designed to foster the professional growth and educational advancement of its members; **NOW, THEREFORE,**

**BE IT RESOLVED, THAT I, BOB FILNER**, the 35<sup>th</sup> Mayor of the City of San Diego, do hereby proclaim, the week of July 21- July 27, 2013, to be "Contract Management Week" in the City of San Diego in recognition of the contributions that the thousands of contract managers make to our economy and quality of life.

IN WITNESS WHEREOF, I HAVE HEREUNTO SET MY HAND, THIS DAY,  
AND HAVE CAUSED THE SEAL TO BE AFFIXED HERETO:



BOB FILNER  
MAYOR

July 21, 2013

DATE

## Membership Focus – Meet Gabriel Olivas



Mr. Gabriel Olivas began his government career as a Contract Specialist with the Naval Acquisition Intern Program (NAIP). He served in the position of Contract Administrator, Senior Administrative Contracting Officer (ACO), Grants Officer (GO), and Property Administrator (PA) for the Office of Naval Research (ONR), University Business Affairs. He provided guidance and direction on contracting processes for a wide variety of contracts/grants for support of basic R&D for educational and non-profit institutions to ensure compliance with Federal Regulations (FAR), Department of Defense Federal Acquisition Regulation (DFAR), Department of Defense Grant and Agreement Regulations (DoDGARs),

Office of Management and Budget (OMB) circular, NASA Handbook, and various Property Manuals. His experiences include contracting for ONR, Arlington, VA and SPAWAR System Command. Mr. Olivas has been the guest speaker for the National Educational Seminar(s) for National Council of University Research Administrators (NCURA). He is currently Chair's the Contract Administrator's Round Table (CART) meeting for NCMA San Diego, CA. The CART meeting is a vital resource to the contracting environment in providing an educational and networking bridge between public and private procurement professionals, allowing this increasingly significant workforce the opportunity to learn and grow from each other in a neutral, collaborative, team-oriented environment.

Mr. Olivas holds a MBA from University of Phoenix. He is the Regional Director, ONR San Diego CA. Prior to joining ONR Mr. Olivas served in the US Marine Corps.

## Fellow Focus – Rese Farrish *by James Southerland, Fellow, CPCM*

Welcome to Rese Farrish, the San Diego chapter's newest FELLOW.

On 29 April, the president of NCMA advised Rese that his application for FELLOW had been approved. The FELLOW designation is reserved for individuals who have made significant contributions to the field of contracting and to NCMA.

Rese is currently a Senior Subcontract Administrator at General Atomics; Electromagnetic Systems, where he manages major subcontracts for the EMALS program, the electromagnetic aircraft launch system. After retiring from the Air Force in 2006, Rese joined Global Strategies Group which required extensive travel and subcontracting in the Middle East which allowed him to leverage his prior experience as a contracting officer with the Coalition Provisional Authority in Iraq. Prior to joining General Atomics, he was a supply chain manager with divisions of Raytheon.



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With NCMA, he has served various chapters as education chair, board of directors and other administrative positions. He is an adjunct faculty member in supply chain management at Redlands University, taught at the University of Phoenix, and presented at the July, 2012, NCMA World Congress. Rese is a graduate of the University of North Carolina-Charlotte, has an MBA from the University of North Dakota and a Juris Doctor from the Suffolk University Law School in Boston.

Please introduce yourself to Rese at the next NCMA meeting, give him a belated “welcome to San Diego”, and congratulations on the FELLOWS designation, a recognition well earned and deserved.

## **CART Meetings Expand**

*by Brian Greenberg, Fellow, CPCM and Gabriel Olivas*

A long-time benefit of membership in NCMA has been the Contractor Administrator’s Roundtable (CART) meetings. The meetings, which started in 2002, have always featured an opportunity for Chapter members and others to ask questions “off the record” and seek the advice of others in attendance. While there has been a note of topics discussed, the discussion, who asked the questions, and other information of that nature has never been recorded.

The CART meetings started at KES in the Kearny Mesa area and a monthly meeting continues there through the present time. For the past two years, Gabriel Olivas, Regional Director, Office of Naval Research, has been a member of the Chapter Board and CART Chair. Under Gabe’s leadership, the meetings have gone to a new level to provide comprehensive solutions and ideas. They have expanded far beyond the expectation of having one or two government representatives to having 5 or 6 at each of the last two meetings. The highlight of all this is that up to 5 Defense Contract Management Agency administrative contracting officers routinely are in attendance. Special thanks to our DCMA friends Greg Bell, Cindy and her staff: Robin, Mike, and Rick. With this added expertise, a CART meeting can turn your concern into just another day’s event.

Some of the North County participants observed the difficulty of attending a CART meeting in Kearny Mesa. Long-time Chapter supporter Brian Greenberg, Government Contracts Director, ViaSat, volunteered to host a North County CART meeting on an experimental basis in 2012. That “experiment” has grown to a regular monthly meeting that discusses a wide range to topics in a format similar to the Kearny Mesa meetings. While the formats are the same, these 2 monthly meetings cover both some similar and some widely disparate topics.

Attendees are empowered to use their background and ingenuity to discuss your concerns. They provide a wealth of contract management experience and are prepared to help with possible resolutions or ideas. When your next office concern appears, our team of specialists at the CART meeting(s) will guide you through and hopefully provide you a successful solution!



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The Kearny Mesa meetings are held on the 2<sup>nd</sup> Wednesday of each month at 7:30 a.m., at KES. Light food appropriate to a morning snack is provided, along with coffee for those who need it to get their day started. The North County meetings are held on the 4<sup>th</sup> Wednesday of each month at 11:30 a.m., at ViaSat. A light lunch is provided. Both meetings are intended to last an hour, but after-meeting conversations often continue to discuss some particular concern raised by one of the meeting's attendees for which another attendee has some specific recommendations or advice.

Look for the monthly Chapter e-mail that notifies you of both CART meetings and plan to attend. Plan to attend and see how the CART program has expanded and could be helpful to you in better performing your day-to-day job duties.

## Webinars/Seminars/Workshops

### February Event

#### **“How to Pass an Estimating System Review”**

*by Marilou Pennington*

On February 27<sup>th</sup> the San Diego Chapter hosted a morning seminar at the Paradise Point Resort with the San Diego Chapter of the Association of Government Accountants. The topic presented was “How to Pass an Estimating System Review”. Presenters were James “Jay” Gallagher – Partner

LLP, Jami Levy – Pricing Manager from Northrop Grumman and David Trotta – Estimating Manager from ViaSat.



Jay Gallagher covered the DOD “Business Systems Rule” which requires contractors with CAS-covered contracts awarded after May 2011 to have six approved systems including Estimating. The Government believes that weak control systems “increase the risk of unallowable and unreasonable costs” being passed on to the taxpayers. Contractors found to have deficient systems may be subject to payment withholds. Jay stressed the importance of integrating an estimating system with the accounting, purchasing and budgeting processes

because proposals are built on the integrity of the data that comes from these processes.

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Jami Levy explained the importance of “data driven” estimating to the group. Basis of Estimates (BOEs) should provide the information to support accurate, credible and traceable estimates. In our own daily lives, we are confronted with estimates for the products and services that we use and the credibility of those estimates are based on the data that supports them. In turn, our potential customers are counting on our ability to support our estimates with good source data and relevant historical information. Our estimating processes should be documented and defined so the process can be consistent and repeated for future estimates.

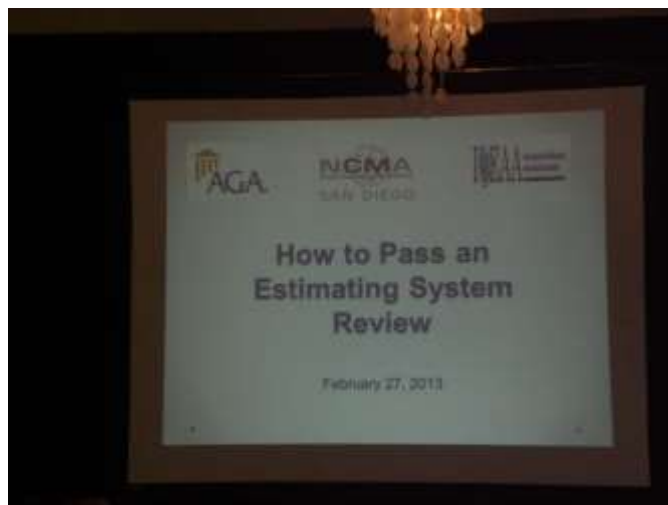


David Trotta helped prepare the group for an Estimating System audit by walking through the pre-audit process from an auditor’s perspective, the entrance conference, how to best communicate with the auditor and the major areas of the audit. Contractors will need to walk through their estimating processes with the auditors, thus the importance of having a written process that can be reviewed. The contractor should be able to exhibit good controls surrounding the system and proper use of the system by trained employees. In conclusion, David provided important steps contractors should follow to ensure estimating system compliance.



A copy of the presentations from the seminar can be found on the Chapter website.

**Marilou Bautista Pennington, AGA Board Member, Government Accounting - General Atomics Aeronautical Systems, Inc.**



## March Event

### **“Government Property Management”** *by Victoria Marin*

Our San Diego NCMA Chapter had the honor to host Dr. Douglas Goetz, CPPM at our Government Property System Reviews Seminar on March 20th. Dr. Goetz joined us in San Diego from Ohio where he is the president of GP Consultants LLP. As a former Property Administrator with the DoD, he was able to share with us valuable information and tips to better our government property maintenance within our workplace. Dr. Goetz made the topic of Government property intriguing and very entertaining with his humor and interaction with the audience.



The presentation focused on government property management and system requirements for maintaining property and passing government audits. Our government property systems are mandatory and require annual audits for DOD contracts. Therefore, Contractors





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as well as Contracting Officers must be aware of all the requirements and processes contained in the FAR and other government property audit sources. Failure to understand these contractual requirements can result in a company's disapproval of their property system or withholding of funds.

Responsibility and managing government property is not only the job of the Property Administrator but every employee that has access to government property. The presentation overall made you realize just how important maintaining, recording, and tracking government property is and how much responsibility there is on both sides of the fence.

Dr. Goetz has given several presentations on the contractual aspects of Government property across the country and around the world in a wide variety of forums including at numerous NCMA World Congresses. For more information on his services and classes, please be sure to check out his website and contact information which we have posted on the San Diego NCMA website along with the presentation slides.

## **April Events**

### **“Surviving Sequestration Road Tour: San Diego, CA”**

***by Maurice Caskey, CFCM, CCCM, Fellow***

The NCMA San Diego Chapter partnered in presenting the *Surviving Sequestration Road Tour: San Diego, CA*, event on April 30, 2013. Maurice Caskey made a brief presentation highlighting the benefits of being a member of NCMA in the current contracting environment.



Brian Groves

The purpose of the event was for Deltek to present the results of its Deltek Clarity: GovCon Industry Study that looks at trends in business development, project management, financial metrics and operational, and compliance and risk management. The focus of this year's study was the impact of U.S. Government sequestration on government contractors. The San Diego presentation also provided information on local government contracting. Brian Groves, Deltek's Director of Product Strategy (see photo 1), made an informative, data-rich presentation that looked at government contracting over the past 2 years and into the 2013–14 trends.

Brian's presentation was followed by a panel discussion with Alan Stewart, Executive Vice President & CFO of Epsilon Systems, Jody Lund, President & CFO of ITB Consulting, Richard DeVos, Controller & Assistant CFO of Richard Brady & Associates, and Bob Bettwy, Director

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of Finance of EADS North America Test and Services (seen left to right in photo 2). The panel answered questions from the floor that focused on the impacts of sequestration as seen in the San Diego region and in government contracting in general.



Panel Members

### **“International Aspects of US Government Procurement”**

***by Theresa Robinson Harris, CPCM and Ray Chalupsky***

On April 17<sup>th</sup> Mr. William Weisberg, esq., presented a seminar to the chapter on the International Aspects of US Government Procurement. Included in his dynamic presentation were such topics as:

- The Buy American Act (BAA)
- The Trade Agreements Act (TAA)
- The American Recovery and Reinvestment Act (ARRA)
- The Berry Amendment (to the Defense Appropriation s Act originally passed in 1941)
- Compliance Programs to the above
- Export Compliance issues (International Traffic in Arms Regulations ITAR, Foreign Corrupt Practices Act FCPA)



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Other topics Mr. Weisberg covered were Security Clearances and contractual requirements, Committee on Foreign Investment in the United States (CFIUS) and Foreign Ownership, Control or Influence FOCI and Foreign Military Sales and Funding issues.

The breadth and depth of the subject matter gave attendees a good working grasp and impacts of the above provisions.

For a copy of his presentation see the Presentation Materials tab.



## NCMA San Diego Chapter Election 2013-2014 Results

*by Quyen Tran, CPCM, CFCM, CCCM*

The election committee, on behalf of the NCMA San Diego Chapter, thanks all the members who have cast their vote for the 2013-2014 program year election. The total vote was 48 members. Please join me in congratulating our incoming new Board of Directors starting in July 2013:

President – Mark Cook  
Vice President – Theresa Robinson-Harris  
Treasurer – Joni Shirley  
Secretary – Thomas Salyers  
Education – Courtney Kappel  
Membership – Nalani Moore  
Arrangements – Diane Cherniak

## Certification Study Groups – CPCM and CFCM

*by Daniel Chalfant*

The San Diego chapter of the National Contract Management Association (NCMA) will be conducting Certification Study Groups.

The Chapter has scheduled two Study Groups:

1. Certified Federal Contract Manager (CFCM)
2. Certified Professional Contract Manager (CPCM)

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These two study groups will meet one night each week for six weeks to prepare to take the exam:

We have selected Group Leaders and Locations for these study groups. The Chapter will provide guidebooks, practice exams, and power-point presentations.

The study Groups are as follows:

The CFCM study Group will meet at Photon.

Diane Cherniak will host, Christina Peterson will lead.

Photon Address is:

9985 Pacific Heights Blvd #200

San Diego, CA 92121

CFCM will meet on Wednesdays at 6 pm to 8 pm.

Dates: 5 June 2013 thru 10 July.

The CPCM study group will meet at KES.

Mark Cook will host. Carlos Santiago will lead.

KES address is:

9325 Sky Park Court, Ste. 300

San Diego, CA 92123

CPCM will meet on Tuesdays at 6:00 pm to 8 pm.

Dates: 4 June 2013 thru 9 July.

If you would like to join a study group, just show up on the first night!



**July 2012 – June 2013 CALENDAR OF EVENTS**

<b><u>WORKSHOPS</u></b>	<b><u>TOPIC</u></b>	<b><u>GUEST SPEAKER(s)</u></b>
<b><u>WEBINARS</u></b>	<b><u>TOPIC</u></b>	<b><u>PRESENTER(s)</u></b>
May 9, 2013	Davis Bacon Act/Service Contract Act/Walsh-Healey Public Contract Act	William Weisberg, Bryan Cave LLP TBD
June 18, 2013	Ten Tools for Subcontracting	Tom Kirklin, Raytheon Company
<b><u>SEMINARS</u></b>	<b><u>TOPIC</u></b>	<b><u>GUEST SPEAKER(s)</u></b>
May 15, 8:30 am – 11:30 am	No Event Scheduled	No Event Scheduled
June 19, 8:30 am – 11:30 am	No Event Scheduled	No Event Scheduled

**Seminar/Workshop Location** is at **Four Points by Sheraton**, 8110 Aero Drive, San Diego CA 92123, otherwise noted on the website.

**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).**

**A notice will be posted for each event and you can register online starting about 4 weeks before the event.**

**July 2012 – June 2013 CALENDAR OF EVENTS**


<b><u>CART MEETINGS</u></b>	<b><u>LOCATION</u></b>	<b><u>RSVP</u></b>
May 8, 7:30 am – 8:30 am	<b>KES</b> 9325 Sky Park Ct., Ste. 300	Mark Cook, (858) 292-0922 x221 mark@kes.com
May 22, 12:00 – 1:00 pm <i>Lunch Provided</i>	<b>ViaSat Inc.</b> 6155 El Camino Real Carlsbad, CA 92009	Brian Greenberg, (760) 476-4117 Brian.Greenberg@viasat.com
Jun 12, 7:30 am – 8:30 am	<b>KES</b> 9325 Sky Park Ct., Ste. 300	Mark Cook, (858) 292-0922 x221 mark@kes.com
Jun 26, 7:30 am – 8:30 am	<b>ViaSat Inc.</b> 6155 El Camino Real Carlsbad, CA 92009	Brian Greenberg, (760) 476-4117 <a href="mailto:Brian.Greenberg@viasat.com">Brian.Greenberg@viasat.com</a>
Jul 10, 7:30 am – 8:30 am	<b>KES</b> 9325 Sky Park Ct., Ste. 300	Mark Cook, (858) 292-0922 x221 mark@kes.com
Jul 24, 7:30 am – 8:30 am	<b>ViaSat Inc.</b> 6155 El Camino Real Carlsbad, CA 92009	Brian Greenberg, (760) 476-4117 Brian.Greenberg@viasat.com
Aug 14, 7:30 am – 8:30 am	<b>KES</b> 9325 Sky Park Ct., Ste. 300	Mark Cook, (858) 292-0922 x221 mark@kes.com
Aug 28, 7:30 am – 8:30 am	<b>ViaSat Inc.</b> 6155 El Camino Real Carlsbad, CA 92009	Brian Greenberg, (760) 476-4117 <a href="mailto:Brian.Greenberg@viasat.com">Brian.Greenberg@viasat.com</a>


**No Camera phones allowed on-site at ViaSat.**

**July 2012 – June 2013 CALENDAR OF EVENTS**






<b><u>BOARD MEETINGS</u></b>	<b><u>LOCATION</u></b>	<b><u>RSVP</u></b>
May 1, 7:30 am – 8:30 am	<b>KES</b> 9325 Sky Park Ct., Ste. 300	Mark Cook, (858) 292-0922 x221 mark@kes.com
Jun 5, 7:30 am – 8:30 am	<b>KES</b> 9325 Sky Park Ct., Ste. 300	Mark Cook, (858) 292-0922 x221 mark@kes.com


## 2012 – 2013 NCMA-SD Board of Directors

Position	Officer	Email	
President	Mark Cook	<a href="mailto:President@ncmasd.org">President@ncmasd.org</a>	
Vice President	Theresa Robinson Harris, CPCM	<a href="mailto:Vice-President@ncmasd.org">Vice-President@ncmasd.org</a>	
Treasurer	Joni Shirley	<a href="mailto:Treasurer@ncmasd.org">Treasurer@ncmasd.org</a>	
Secretary	Victoria Marin	<a href="mailto:Secretary@ncmasd.org">Secretary@ncmasd.org</a>	
Membership Director	Lee Davis, CPCM	<a href="mailto:Membership@ncmasd.org">Membership@ncmasd.org</a>	
Arrangements Director	Nalani Moore	<a href="mailto:Arrangements@ncmasd.org">Arrangements@ncmasd.org</a>	
Education Director	Dan Chalfant	<a href="mailto:Education@ncmasd.org">Education@ncmasd.org</a>	

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Chapter Advisor	Jack Friery	<a href="mailto:Chapter-Advisors@ncmasd.org">Chapter-Advisors@ncmasd.org</a>	
Employment	Christine Powell	<a href="mailto:Employment@ncmasd.org">Employment@ncmasd.org</a>	
Small Business & Military Outreach	Ken Adam	<a href="mailto:Outreach-SB-Military@ncmasd.org">Outreach-SB-Military@ncmasd.org</a>	
College Outreach	Julianne Hagan, CFCM, CPCM	<a href="mailto:Outreach-College@ncmasd.org">Outreach-College@ncmasd.org</a>	
CART (San Diego)	Gabe Olivas	CART@ncmasd.org	



CART (Carlsbad)	Brian Greensberg, Fellow, CPCM	CART@ncmasd.org	
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Fellows	James Southerland, Fellow, CPCM	<a href="mailto:Fellows@ncmasd.org">Fellows@ncmasd.org</a>	
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