

NCMA NEWS

San Diego Chapter



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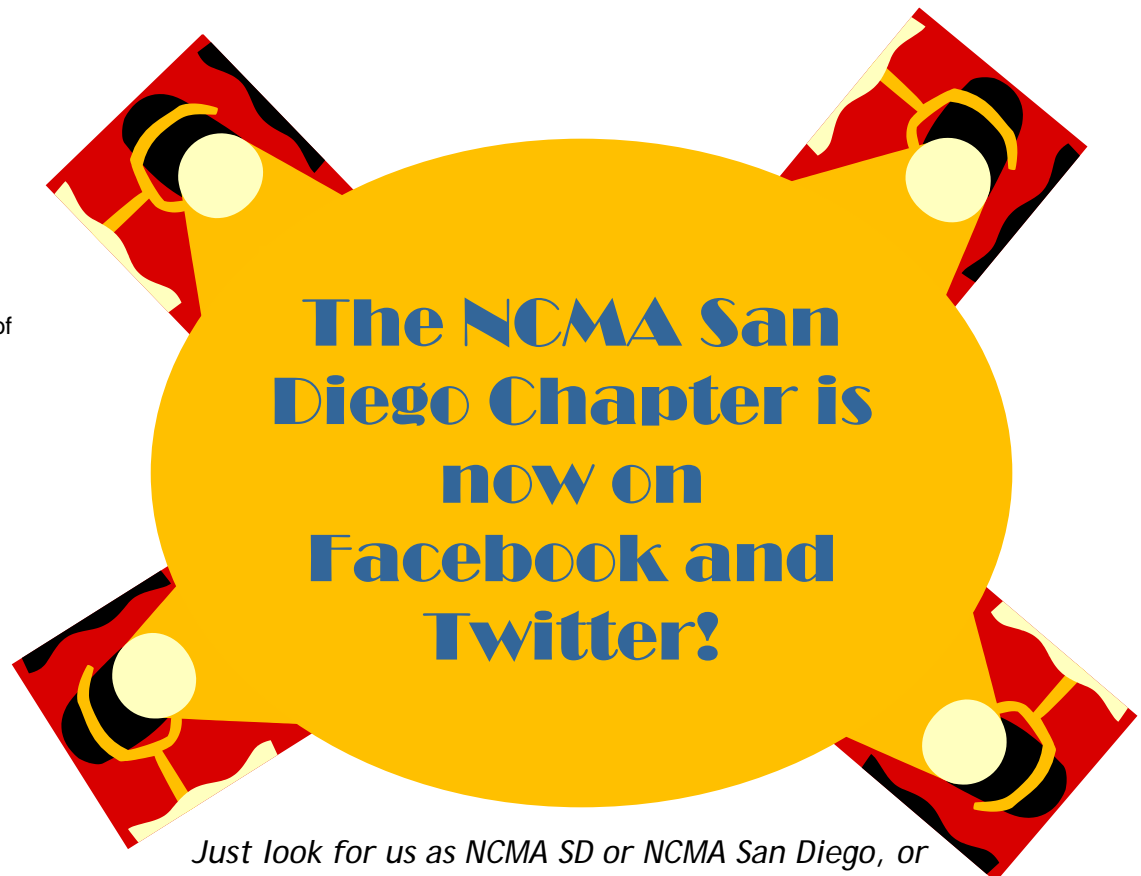
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Upcoming NCMA-SD Events

- June 23 Virtual Conference: Task, Delivery Order, and Schedule Contracting Community of Practice

*NOTE: There are no CART meetings planned until September 2010, after the start of the new Chapter program year



Just look for us as NCMA SD or NCMA San Diego, or follow the link on the chapter website

President's Message

By Dan Chalfant

Bring your US Government Customer to the next NCMA event!

In an "Open Letter to Federal Employees" (Contract Management Jan 2010), NCMA has summarized the new Federal Government guidelines for participation by US Government Employees in NCMA events. These guidelines apply to federal employees in a personal capacity acting exclusively outside the scope of their official position. The new guidelines allow federal employees 1) to become members of NCMA, 2) to attend conferences, workshops, and meetings, 3) to participate on the Board of Directors, 4) to present educational briefings, 5) to participate on the NCMA Executive Advisory Council, 6) to use Government email on a limited basis to forward NCMA announcements, 7) to accept cash awards and free attendance at an event, 8) to provide the use of Government facilities.



Activities **not** allowed for federal employees include 1) directing subordinates to participate in NCMA events, 2) making decisions in their official government capacity that would further the purposes of NCMA, 3) using their official government position to advocate an NCMA event, 4) accepting cash awards if their official position could substantially affect the interest of NCMA.

So invite your client or customer to attend the next NCMA Contract Administrators Round Table (CART), seminar, or midday workshop. I hope to see **BOTH** of you there!

Daniel A Chalfant
President, NCMA San Diego

NCMA National Aerospace & Defense Conference Highlights

By Jack Friery

The NCMA National Aerospace & Defense Conference was held in San Diego on March 25 and 26, 2010. More than 300 participants from around the country attended. The first-day keynote address was made by James A. Bell, the CFO of The Boeing Company; the first-day lunch speaker was LTG Tom Sheridan, Commander, USAF Space and Missile Systems Center; and the second-day keynote address was made by Tim Dowd, Executive Director, Contracts, Space & Naval Warfare Systems Command. Panel sessions both days covered a broad range of topics, including contingency contracting in Iraq, Industry and Government perspectives on acquisition initiatives, and defining "Inherently Governmental" and the Obama Insourcing Policy.

NCMA San Diego chapter members Dan Chalfant, Jim Southerland, Jack Friery, and Diane Peluso contributed to the conference by holding whole-day training sessions for NCMA members who had signed up to take the CPCM and CFCM examinations at the conference site.

Membership Focus – Meet Gunnar Schalin

Gunnar Schalin joined the Board of NCMA San Diego in 2008, where he serves as Chair for the Small Business and Military Outreach Committee. The purpose of this committee is to involve local small businesses as well as DoD civilians and military members with our Chapter.

Gunnar began serving as the Program Director of the San Diego Contracting Opportunities Center (SDCOC) in 1998. The SDCOC is one of five DoD-funded Procurement Technical Assistance Centers (PTAC) located in California. Its purpose is to provide government contracting and marketing assistance to those San Diego small businesses desiring to sell their products or services in the government or public agency sectors.



Gunnar grew up in Chicago, Illinois just two blocks from Wrigley Field where the Chicago Cubs play baseball. (He remains a “card-carrying” Cubbies fan.)

He completed his undergraduate work in Human Factors Engineering at the University of Illinois, in Urbana, Illinois. Upon graduation, he was commissioned into the Army, and attended Armor School and Flight School. From 1969-1971 he was deployed to Vietnam with the 3rd Squadron, 17th Air Cavalry (Red Horse). There he served as an Army Aviator with Alpha Troop (Silver Spur), and later as Squadron Intelligence Officer, receiving numerous awards for service and heroism. Returning from Vietnam in 1971, he commanded a training unit at Fort Dix, NJ.

In 1972 he left active duty to join the Army Reserve and completed Air Traffic Control School prior to moving to Columbus, Ohio. There he was employed by Rockwell International. With Rockwell Missile Systems Division, he performed human factors studies, system safety analyses, marketing functions, and AH-IR Cobra engineering test pilot duties relating to the development of the Hellfire laser guided missile.

In 1979 he was recruited to work for Teledyne Ryan Electronics in San Diego, California where he was employed over the next fifteen years. With Teledyne he performed in a variety of roles including marketing, procurement, subcontracts management, and program management. As Procurement Services Manager and Small Business Liaison Officer (SBLO), his subcontracting program achieved the ‘Outstanding’ rating from the combined SBA and DCMA review team.

After leaving Teledyne and prior to joining the San Diego Contracting Opportunities Center PTAC, Gunnar served in executive capacities for three San Diego area small businesses and start-ups in the software and bio-technology industries.

He holds a professional certificate in Entrepreneurship as well as a Master of Science in Business Administration (Information Systems) from San Diego State University. He is a graduate of the Army, the Navy (with distinction), and the Air War Colleges. His two best assignments with the Army were as Commander, 168th Aviation Group (Combat), and Deputy Commander of Corpus Christi Army Depot, TX.

Gunnar serves on the San Diego State University’s Contracts Management Advisory Board. He is an active member of the San Diego Public Agency Consortium. He is a member of the Caltrans Small Business Committee, and sits on their Calmentor Professional Services mentor-protégé committee. He is a charter member of the City of San Diego Mentor Protégé Advisory Committee. Previously he chaired the City of San Diego Public Works Committee’s “Subcontracting Subcommittee.” He is the immediate Past President of the San Diego Supplier Development Council.

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Membership Focus – Meet Gunnar Schalin

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He was recognized by the Small Business Administration in 2002 as Minority Small Business Advocate of the Year in San Diego. His program was later recognized by Association of Procurement Technical Assistance Centers (APTAC) as the best PTAC in the nation. He achieved APTAC Level III Certification in 2000. Since then he has held the APTAC national offices of Treasurer, Secretary, and Regional Director.

Under his leadership, the PTAC received awards from the San Diego Supplier Development Council in 2002, 2005, 2006 and 2007. It also received the “Champion” award from the Center for Veteran Enterprise in 2004, 2005 and 2006. He was recognized by the San Diego Supplier Development Council as “Best Small Business Advocate” in 2002, 2004 and 2006. In 2010 he received the Award of Merit for Outstanding Service presented by the San Diego Chapter of the American Public Works Association.

Gunnar enjoys hiking and Civil War history, especially that related to the life of Colonel Joshua Chamberlain.

NCMA Assists in Roll-out of New Contracting Program for Service-Disabled Veteran Business Owners

The Federal Contractor Certification (FCC) program will be rolled out to San Diego’s service-disabled veteran business owners on July 6. The FCC is an initiative of the Department of Veterans Affairs in conjunction with the Association of Procurement Technical Assistance Centers (APTAC). The San Diego Chapter of NCMA is joining forces with the San Diego Contracting Opportunities Center, the PTAC serving San Diego County, in implementing this program locally. FCC is designed to reward service-disabled vets who complete a course of study in federal contracting. To achieve FCC Level 1 Certification, participants must complete ten self-paced classes, most of which are online through Defense Acquisition University. Upon successful completion of all course work, a comprehensive examination will be administered. We anticipate that Chapter volunteers will make themselves available to help participants with coursework and to assist in administering the final exam. Those who pass the exam will be authorized to use a special logo on their marketing materials indicating that they are graduates of the program. In the future, Levels II, III and IV will be offered and the program will be expanded to all veteran and small business owners.

General information can be found at <http://www.vetbiz.gov/outreach/FCC.htm> . For specific information, contact Ms. Trisha Ferrand at the San Diego Contracting Opportunities Center (PTAC) at (619) 285-7020 or tferrand@ptac-sandiego.org.

SPAWAR Contracts Executive Tim Dowd Speaks at Monthly Chapter Workshop: New Contracting and Acquisition Rules – March Workshop Debrief

By Jack Friery

Tim Dowd, Director for Contracts, SPAWAR, spoke on new federal acquisition developments at our chapter mid-day workshop on March 22, 2010. Highlights of Tim's presentation include the following:

- The DOD IG has criticized DOD contracting agencies for such shortfalls as not performing market research, conducting inadequate competitions, using the wrong contract types, and providing unsupported determinations of fair and reasonable prices.
- Per DFARS 201.170, peer reviews are now required for DOD solicitations exceeding \$1B, whether sole source or competitive. The SPAWAR CANES program is subject to this review, which will be conducted by OSD and the US Air Force. Additionally, there will be post-award peer reviews for service contracts exceeding \$1B.
- Award fee rules have changed, as announced in the Federal Register at 74 Fed. Reg. 52856 (Oct. 4, 2009). Award fee criteria must be more objective, there will be no fee award if the contractor performs unsatisfactorily, and there will be no rollover of unearned award fees.
- The new Fraud Enforcement and Recovery Act of 2009 broadens the False Claims Act. A claim need not be "presented" for the False Claims Act to apply. Additionally, the definition of "materiality" has been revised, and the requirement to prove intent is eliminated.
- The Weapons Systems Reform Act of 2009 tightens existing rules for Organizational Conflict of Interest.
- The 2010 DOD Authorization Act suspends public/private competitions, enhances protections in cases of contract "bundling," and clarifies that third-party support contractors must execute Nondisclosure Agreements when the Government gives them access to limited rights technical data. The act also confers subpoena power on DOD IGs.
- A DOD deviation to FAR 42.1502 provides that contractor past performance information must be recorded for systems and operations support contracts over \$5M, and services and IT contracts over \$1M, among others.
- OFPP will issue policies to prevent personal conflicts of interest for employees of contractors performing inherently governmental functions. This is in addition to guidance that was issued in November 2009 by the Undersecretary of Defense (AT&L).
- A White House memo issued in March 2009 mandates more competitive contracts and fewer cost-plus contracts. DOD has issued goals to implement this.
- The Federal Government is augmenting its acquisition workforce. Approximately 20,000 additional employees are being sought in the next five years. About 10,00 positions will "insource" from contractor to civil service positions.

Join us for a *Virtual Conference!*

As part of the NCMA San Diego Chapter's ongoing effort to provide educational opportunities, the Chapter has registered for the **June 23rd Task, Delivery Order, and Schedule Contracting Community of Practice** virtual conference.

MEETING INFORMATION

Date:	Wednesday, June 23, 2010
Location:	8787 Complex Drive, Suite 400 Plenty of parking behind building
Time:	9 am - 1pm Please arrive 15 minutes early to sign in & receive badges
Cost:	FREE to NCMA members and \$10.00 for Non-Members Non-Members can pay cash at the door or make check payable to NCMA San Diego. Beverages, water, and snacks will be provided.
Hosted by:	Integritys Corporation, Joni Shirley

RSVP to: Joni Shirley at, shirley_joni@integritys.com. Visitor badges will be distributed at the reception desk on the 4th floor. Space is limited so sign up early.

If you award, bid on, provide services and supplies under or write orders against task, delivery order, and schedule contracts, your attendance at this exclusive professional event is essential. This virtual conference will provide instruction on General Services Administration Federal Supply Schedule contracts, government-wide acquisition contracts, multi-agency contracts, and single and multiple award task and delivery order contracts. Earn 4 CPE hours/CLP by attending.

Featured Presenters:

Brenda Karl, Branch Chief, Contract Specialist, DOI National Park Service
Jim Phillips, Executive Vice President, Centre Consulting Incorporated
Howard Porter, Vice President, Contracts, CACI-Federal
Steven Weiss, Executive Vice President, Government Business Operations, CACI Inc.
Joanne Woytek, Solutions for Enterprise-Wide Procurement (SEWP), NASA

Social Media Networking for Contracts Professionals

By Ray Chalupsky, CPCM, Fellow

Looking for a job? Need some advice on a contracts issue? Want to be very current in the latest information on your profession? Time to jump on the social media bandwagon.

Social media networking is the latest exploding method of staying in touch and keeping current. Businesses use it with ever-increasing success. And not just large businesses like Coca Cola and Dell; small businesses are using it and having great results. Taco vendor Kogi BBC publicizes its trucks' arrival at locations via Twitter only to find hundreds of hungry customers waiting. Southwest Airlines tweets exclusive deals to its followers. Comcast uses Twitter to enhance and augment their customer service centers. Seventy-five million people tweet over 50 million updates per day. And it is all free. NCMA National tweets daily on issues important to its members. Many contracting organizations tweet daily about legislation or regulations impacting the contracting field. Companies can fill jobs by tweeting vacancies. Contract personnel can use it to research potential service providers. It is the latest in a string of ways people stay connected and in touch and in tune.

Getting started is very easy. Go to www.twitter.com and set up an account--it's free! Then carefully establish your profile to indicate what you are doing and what you are seeking. For example, if you are a subcontracts administrator seeking a new job as a contracts manager you would make sure to use those terms (subcontracts, contracts) in your profile. Next, start searching for companies that have tweeted a job vacancy in contracts. It takes some time but a lot less than answering newspaper ads, etc.

To stay current in your profession, seek out people/organizations to follow who are in your field. NCMA headquarters and various chapters around the country are great ones to start with. The *Washington Post* and *New York Times* carry articles that often impact our profession. *The Hill* carries lots of information on legislation working its way thru Congress. *Government Executive* is another great resource. There are thousands of sources for you to follow, and plenty of people to converse and network with.

The younger generation is tweet-experienced. This is the future and those that fail to get involved run the risk of getting left behind as more and more communicating, networking, and passage of information is done online, in real time. As a profession, we cannot ignore this way to reach potential members and potential employees. And it is all free.

CFCM: A Manager's Perspective

By Maurice R. Caskey, CFCM

Managing a multi-person department that performs contract administration presents challenges in the area of personnel administration. Every manager faces personnel turnover through attrition, promotion or other causes. Such turnover generally requires replacement of the individual in the position being vacated. When qualified personnel are available for promotion within the department, the selection is greatly simplified; qualifications are known on a first-hand basis. Recruitment within a large company depends to some extent on the reputation of the individual(s) applying for the position. When recruitment is expanded to outside the company, the selection process can be long and arduous.

Each recruiting effort typically requires qualifications be considered for personnel who apply from a variety of sources. A tool that can be used by those involved in the selection process is certifications to demonstrate a level of professional qualification. The National Contract Management Association (NCMA) offers a series of certifications in the field of contract management. NCMA's Certified Federal Contracts Manager (CFCM) and Certified Commercial Contracts Manager (CCCM) programs identify those individuals who have achieved a defined level of expertise in Federal Government and commercial contracting, respectively.

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April Seminar Debrief – Contract Closeouts *By Maurice R. Caskey, CFCM*

Contract Closeout—Finish the Paperwork was the final half-day seminar for the NCMA San Diego Chapter's 2009–10 program year. It was presented on April 12 at the Sheraton Four Points hotel. Fifty-seven registered attendees heard some good news and some bad news about contract closeouts.

Cass Carol, Team Lead, Brace Management Group, currently is a support contractor working with the Space and Naval Warfare Systems Command (SPAWAR) and other San Diego area U.S. Navy contracting offices, specializing in contract closeouts. He described three methods available to contracting officers for closing contracts: standard closeout, quick closeout, and early closeout. The latter two methods allow contracting officers and contractors to enter into agreements to close small contracts, task orders (TOs) and delivery orders (DOs) in an expedited manner. The sooner a contract, TO or DO can be closed, the better for both parties. The Navy's flexibility and willingness to use these methods was the good news.

The bad news is that establishing final rates and incurred costs far too often remains the "long pole in the tent" for closing contracts. "Awaiting audit results" is an accurate status description for the preponderance of contracts that need to be closed.



Cass Carol addresses a question from the audience.



From L to R: Maurice Caskey and Cass Carol, Seminar presenters

Maurice Caskey, CFCM, CCCM, a private consultant, described the closeout process from the contractors' perspective. He brought real-world experience in closing contracts ranging from relatively small-value study contracts to major design and construction Navy acquisition programs. One point he emphasized was the need for contractors to keep current their documentation of performance to be able to initiate closeout as soon as a contract, TO or DO is physically complete.

The authors opened the floor for questions and provided advice in response based on their real-world experience. They provided helpful hints for both government and contractor personnel to facilitate closing contracts, a process that starts upon contract award. Their presentation, which can be found on the Chapter website at <http://ncmasd.org/presentations20092010.html>, provides flow charts and a variety of citations to helpful reference

material. A number of Federal Acquisition Regulation (FAR) and Defense FAR Supplement (DFARS) provisions apply to the close-out process. The presentation slides and list of reference material guide the reader through the process and the applicable FAR and DFARS provisions for each of the three closeout methods.

*CFCM: A Manager's Perspective**Continued from Page 7*

Departments that administer Government contracts typically require individuals to be well-versed in the Federal Acquisition Regulation (FAR) as well as any agency FAR supplement. Therefore, employees of both small and large businesses must understand certain FAR basics if they are to be successful in the Federal Government procurement arena.

Companies that sell to local and state governments generally are not concerned with the FAR. Those sales fall under state law, which is based on the Uniform Commercial Code (UCC) in virtually all states except Louisiana. Subcontracts and purchase orders awarded by a Federal Government prime contractor are, almost without exception, governed by state law and, therefore, the UCC. Thus, knowledge of both Federal and commercial contracting requirements is desirable in an individual being hired to fill a vacant or new position.

NCMA's CFCM examination is based on procurement under the FAR. When a job applicant is a CFCM, the individuals responsible for the selection to fill a contracts administration, subcontract administrator or buyer position have *prima-facie* evidence of that individual's knowledge of the FAR.

A candidate should have knowledge of the FAR requirements in the following areas that can impact almost any company that is, or desires to become, a government contractor:

- definitions of terms used in Federal Government procurement
- simplified acquisition procedures including micro-purchases
- the difference between invitations for bids (IFBs), requests for quotes (RFQs), requests for information (RFIs), and requests for proposals (RFPs), a prospective contractor's actions in preparing a reply, and expectation of the government's response to the reply
- commercial item contracting (and the narrow scope of the FAR that applies to that type procurement)
- different types of contracts including purchase orders, blanket purchase agreements, simplified contract format, and uniform contract format
- application of Public Law in the FAR
- small business and other social program requirements

This list represents the many areas of knowledge covered by the CFCM examination. It only touches on the wide variety of knowledge that will be required on a day-to-day basis to successfully fill a contracts administration position.

An individual desiring to achieve the CFCM certification must meet certain minimum requirements in addition to a detailed knowledge of the FAR. Among these are having achieved academic success as well as having attended relevant courses of continuing professional education (CPE). Thus a CFCM-certified candidate has the education background that indicates readiness to "hit the ground running" upon entering into employment in the hiring manager's department.

It is important to know if a candidate maintains current his or her certification. A CFCM certification must be renewed every five years to be current, except for those older professionals who qualify for a lifetime certification by virtue of their age. The recertification process requires evidence of having completed at least 60 hours of relevant CPE over the prior 5-year period.

This means that an individual must stay current in the field of contract administration in order to be recertified. The result is an individual who can offer more to your department starting on day 1 of their employment.

A job applicant with a CFCM certification demonstrates a higher level of interest in the field of contract

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*CFCM: A Manager's Perspective**Continued from previous page*

administration and a greater desire for professional excellence than someone who does not hold a certification in the field of contract management. While other certifications are offered by organizations other than NCMA, the CFCM and CCCM certifications are directly aimed at people who are responsible for administering contracts, subcontracts and purchase orders on behalf of a company. The application and study process leading up to achieving a CFCM certification also demonstrates initiative on the part of the individual.

In conclusion, managers involved in the hiring process can use CFCM certifications as a good indicator of individuals that are both interested in contracts administration and qualified at a defined level, to successfully perform contracts administration work. For two or more individuals who appear to be equally qualified in all other respects, having a CFCM certification can be a deciding factor in the selection process.

Recent NCMA Member Certifications

Beginning with this edition, our chapter newsletter will be recognizing NCMA San Diego members who have recently received an NCMA certification.



Chapter member Cheryl Fisher has recently been named a Certified Federal Contracts Manager. Cheryl is a Procurement Analyst at SPAWAR HQ, working in Contracts Policy to ensure the execution of the contracting process from solicitation, proposal and award, through contract closeout. Cheryl previously worked as a Contract Specialist at SPAWAR HQ and Defense Contracts Management Agency in San Diego. In addition, she was a Quality Assurance Specialist with Defense Logistics Agency for nearly 8 years, including two years as a Contract Administrator. Cheryl served for four years as an Electronic Mechanic apprentice at the Philadelphia Navy Yard and ultimately graduated and spent two years as an Electronic Mechanic. Cheryl is a graduate of the San Diego State Contract Management certificate program, and is currently pursuing her MBA in Finance. All told, Cheryl has over 30 years of federal Government service.

Congratulations, Cheryl!

If you have received an NCMA certification in the past 12 months and are interested in being featured in our newsletter, please contact the Editor at erin.felix@ngc.com. Nominations of other members are also welcome; nothing will be published without the individual's permission. We hope to hear from you!

Congratulations to NCMA-SD Alumna Linda Allen!



This picture was taken at Linda's swearing in. From left to right are her husband, Jim, Linda, and her son Kurt.

Many of you remember Linda Allen from several years ago when she served as President of our San Diego Chapter as well as in multiple other board positions. We would like to congratulate her on her recent promotion to Senior Executive Service. As the Director of Acquisition and Procurement Office (A&PO), Washington Headquarters Services (WHS) she serves as the senior civilian acquisition and procurement executive, providing expert advice and recommendations for all acquisition matters to the Director, Administration and Management (DA&M), Director, Washington Headquarters Services (WHS), and as appropriate, others within the Office of the Secretary of Defense (OSD) to include the immediate staff of the Secretary of Defense and Deputy Secretary of Defense.

Linda supports, coordinates, and executes major projects in support of high visibility, priority programs, such as the Pentagon Renovation; Presidential, statutory, and Secretary of Defense directed boards and commissions, and critical services for OSD staff and Pentagon tenants. In addition, she manages the operations of the WHS contract office and oversees the administration of multi-billion dollar programs, encompassing major construction projects, information technology, professional, and other services.

Managing a staff of approximately 130 personnel within the National Capitol Region, which includes civilian, military and contractors, Linda also serves as the Source Selection Authority (SSA) or the expert advisor to the SSA for a wide range of acquisitions. She is responsible for appointing Contracting Officers, ensuring their qualifications and continued training, overseeing pricing and systems management, and conducting reviews and monitoring internal controls/procedures.

Linda's background consists of over 20 years of acquisition and contracting experience in the Federal Government, having served as a Contracting Officer/Specialist at Naval Space and Warfare Systems Command, Naval Facilities Engineering Command, Commander, Fleet and Industrial Supply Centers, and Naval Public Works Center. While in San Diego she was very active in NCMA and has her CFCM certification. Her education includes Naval Postgraduate School, MSCM, Golden Gate University, MPA, Misericordia University, BS.

She served as a Naval Supply Corps Officer, being the first supply officer and female on Navy Seal Team One. Linda is a member of the Acquisition Professional Community and DAWIA Level III certified in Contracting and holds an Unlimited warrant.

I have known Linda for several years and have had the pleasure of running with her in the early mornings. In her busy schedule, she still finds time to train for and run marathons, DC weather permitting of course! We are all very proud of her, wish her the best, and look forward to her return to San Diego.

Joni Shirley, NCMA-SD Past President

2009-2010 NCMA-SD Board of Directors

Board of Directors

Position	Officer	Email	
President	Dan Chalfant	chalfant_daniel@bah.com	
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College Outreach	TBD	Interested? Contact one of us!
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