

Professional Development Classes 2016 - 2017

	Seminar Title	Date	Instructor
	Building The Foundation - Fundamentals of Procurement	September 15, 2016	Melissa Drew, PMP
NEW	Consortium Buying – The Who, What, Where, Why, and When	September 22, 2016	Judah Seidman, CPSM, CPSD
NEW	Next Steps in Sourcing Techniques and Technologies - Advanced Strategic Sourcing	October 6, 2016	Joanna Martinez
NEW	Best Practice Skill Sets - Leadership, Conflict Resolution, and Change Management for Supply Chain Professionals	October 14, 2016	Tom Cook
NEW	Disrupt the Status Quo - Selling Yourself as a Procurement Professional	October 27, 2016	Joanna Martinez
	Developing and Mastering Your Negotiation Skills for Supply Chain Professionals	November 2, 2016	Tom Cook
	Contract Law 101 – Legal Aspects of Procurement & Supply Management	November 10, 2016	Martin J. Carrara, Esq.
NEW	Supply Chain Management for Entrepreneurs	November 17, 2016	Judah Seidman, CPSM, CPSD
	Creating Effective RFPs to Deliver Excellence	January 19, 2017	Tom Cook
NEW	Global Negotiation Strategies	January 27, 2017	Pernilla Rorso
	Cost Analysis Concepts	February 10, 2017	James V. Kelly, C.P.M.
	Vendor Audits & Assessing Vendor Risks	February 23, 2017	Tom Cook
	Advanced Purchasing Management (2 Day Seminar)	March 29-30, 2017	Tom Cook
	Contract Drafting for Supply Management Professionals	April 6, 2017	Martin J. Carrara, Esq.
	Optimizing Cross-Cultural Communication for Effective Outsourcing (Offshore/Nearshore) Management	May 5, 2017	Pernilla Rorso

Certification Classes 2016-2017

Classes	Date(s)	Instructor
CPSM® Certification Exam 1 Review Class	September 9, 2016 & February 24, 2017	Sal Vitale, C.P.M.
CPSM® Certification Exam 2 Review Class	November 3, 2016 & April 6, 2017	Judah Seidman, CPSM®, CPSD™
CPSM® Certification Exam 3 Review Class	January 13, 2017 & June 9, 2017	Sal Vitale, C.P.M.
CPSD™ Exam Review Class	February 2, 2017	Judah Seidman, CPSM, CPSD

Dear ISM-New York Members,

ISM-New York is proud to launch our 2016-2017 Professional Development program. We designed our new Professional Development strategy and program based on the feedback we received from those our Professional Development Learning Opportunities Survey, as well as benchmarking and our past successes. Based on your demand, we added six new seminars and updated our current seminars to better serve your needs.

The Board of Directors of ISM-New York works diligently to provide you value and education, while ensuring that ISM-New York is relevant at every stage of your career.

As a member of ISM-New York and ISM, you have access to a wide range of benefits including networking opportunities, professional development, knowledge sharing and financial value:

Networking Opportunities

- ✓ Membership Meetings Network face-to-face with industry experts and fellow supply management professionals, all included in the cost of membership with no additional out of pocket expense.
- ✓ Supplier Diversity EXPO Cultivate relationships with diverse suppliers in the New York Metro Area.
- ✓ Sourcing Groups Join industry and/or category -specific roundtable meetings to discuss the latest supply management trends and techniques in that industry and/or for that category.

Professional Development

- ✓ Educational Seminars Prepare to take your certification exams by enrolling in our CPSM® and CPSD™ Certification Exam Review classes. Grow your professional skills in more than eight core competencies by taking our other seminars for emerging, mid-career, and experienced supply management professionals. Earn ISM Continuing Education Hours (CEHs).
- ✓ Career Center Access career information and post job opportunities on our website.

Knowledge Sharing

- ✓ Up-to-date information about affiliate activities via e-mail, electronic newsletters/flyers and on our ISM- New York website.
- ✓ Online Resources Center Learn from the Podcasts, Competitive Edge Newsletter Archives, Presentations and Supplier Diversity Best Practices located on our website.
- ✓ Report On Business Members are able to participate in this monthly report which has both regional and national implications. The survey is known to track and business trends in both the New York City economy and the US economy as a whole.
- ✓ ISM National Website Access information about trends in supply management, including *Inside Supply Management*® Magazine and ISM Report On Business®.

Financial Value

- ✓ Discounts Take advantage of members-only savings on seminars and other products.
- ✓ The Davis Kassa Scholarship Children of ISM-New York members can apply for a chance to win a \$4,000 college scholarship.

To learn more about ISM-New York, contact our Executive Office or visit our website www.ismny.com.

Best Regards,

Julienne B. Ryan Executive Director ISM-New York





ISM-New York, Inc.

ISM-New York, Inc. 2016-2017 Board of Directors Listing

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CORPORATE TRAINING PROGRAMS

ISM-New York can help design corporate training programs to educate your staff to be better equipped in the supply management field. We can customize courses that focus on the unique business needs of your organization. ISM-New York can help you choose from a full-range of supply management core competencies.

Our seminars are designed to encourage active participation among our learners, including facilitated case study discussions and role-playing. Participants earn CEH credits which can be applied toward re-certification.

A knowledgeable supply management organization is a powerful and successful group, and one that can make a difference in top line and bottom line performance. ISM-New York can help your staff become certified in their profession. These on-site certification review classes can come to you: CPSM[®] (Certified Professional in Supply Management), CPSD[™] (Certified Professional in Supplier Diversity).

The Top Ten Benefits of Corporate Training Programs

- 1. Cost Effective: Saves time and travel cost with training at your premises.
- 2. Flexible: Courses can be combined and adjusted to meet your requirements.
- 3. Impactful: Incorporates your organization's objectives.
- 4. Professional: Seminars are current and relevant, taught by experienced and accomplished instructors.
- 5. Convenient: Schedule seminars when it's best for you and your staff.
- 6. Consistent: Provides uniform training and strengthens your team's skills.
- 7. Teamwork: Fosters team spirit and goal orientation.
- 8. Recognition: Increases prestige and recognition of your organization.
- 9. Certification Exam Review: CPSM® or CPSD™
- 10. Motivation: Your team will feel appreciated and supported, they'll in-turn look to improve their own work performance.

For more information on bringing a Corporate Training Program to your office contact ISM-New York's Executive Office at 1-800-975-0725.



TRAIN-THE-TRAINER

Train-the-Trainer Program

ISM- New York is providing companies with an opportunity to bring subject matter experts in-house to train a select group of employees to become in-house trainers and build internal training capabilities. Program participants will learn that the skills sets needed "to do the work" and the skills sets needed "to educate" are very different and much more intensive. They will learn what is required to deliver effective learning programs to the supply management organization, remote teams, and new hires.

Train-the-Trainer subjects include:

Purchasing Management Negotiation Skills Management

Managing RFP's Project Management

Supply Chain Management Managing Import or Export Operations

Domestic and International Logistics Domestic and Foreign Sourcing

Trade Compliance Management Risk Management

Sales Management Customer Service Management

Mergers and Acquisition and Global Expansion/Business Development and Transition in Acquisitions

The week long Train-the-Trainer Program, is held at your location and is designed for up to 5 individuals from the same company. The program is customized in critical ways to assure training success. It is designed to raise the bar of participants' skills sets and enable them to gain responsibility for internal training on specific subjects.

To deliver our Train-the-Trainer Program, ISM-New York partners with Blue Tiger International, a Business, Management, and Education Consulting Firm with over 35 years of experience.

The program is customized in critical ways to assure training success:

- ➤ The training material and structure is uniquely developed for the company and individual(s) requiring the training program.
- The instructors remain accessible to the students for six months following the training to respond to follow-up questions, and provide on-going mentoring. Longer term advocacy relationships can also be established.
- > The program manager and instructors interview key stakeholders in the company and other interested parties to obtain information to make sure the program delivers the necessary training.
- Materials in both hard-copy and electronic format are provided, including text books on the pertinent subject matter and reference materials.
- Every class looks at technology and the favorable impact it can have for the students' execution of their training responsibilities.

For additional details and pricing contact ISM-New York Executive Office at 1-800-975-0725.

CERTIFICATION INFORMATION

Certification - What you need know

If you wanted to become certified and improve your skill set, now is the best time as you have the most amount of options. Make the move to gain supply management's most prestigious designation Certified Professional in Supply Management® (CPSM®) or Certified Professional in Supplier DiversityTM (CPSDTM). These certifications can give you the edge you need in this global marketplace along with the potential to earn more money versus those without certification.

Certified Professional in Supply Management® (CPSM®)

The CPSM® is the credential that surpasses the demands of the international marketplace with multi-faceted skills in areas such as finance, supplier relationship management, organizational global strategy and risk compliance.



For significantly less money than other professional development opportunities you can boost the effectiveness of your bachelor's degree and practical work experience by becoming a CPSM®.

The requirements for CPSM® qualification are:

- Three years of full-time, professional supply management experience (nonclerical, nonsupport) with a bachelor's degree from regionally accredited institution or international equivalent
 OR
- Five years of full-time, professional supply management experience (nonclerical, nonsupport) without a qualified bachelor's degree

AND

Successfully pass three CPSM® Exams, OR, if you are a C.P.M. in good standing, pass the Bridge Exam.

Certified Professional in Supplier Diversity™(CPSD™)

The CPSD[™] is a professional designation for supply management professionals whose responsibilities include supplier diversity. This designation also delivers added value to business leaders and other team leaders who participate in the development of diverse supplier initiatives within the organization. The requirements for CPSD[™] qualification are:



- Successfully pass the CPSD™ Exam.
- Successfully pass Exam 1 of the Certified Professional in Supply Management® (CPSM®). This requirement is waived if the candidate holds a current C.P.M. or CPSM®.
- Minimum of five years professional (non-clerical, non-support) supplier diversity or supply
 management experience (does not need to be primary function), OR three years of professional
 (non-clerical, non-support) supplier diversity or supply management experience if the candidate
 has a bachelor's degree from a regionally accredited college or university (or international
 equivalent).

CERTIFICATION INFORMATION

How will I benefit from pursuing certification qualification?

The certification qualification will enable professionals to gain a clear understanding of their organization's supply operation and enable managers to take an active role in critical decisions. Each step in the development of an organization's products and/or services is controlled by supply management. Current evolution of the profession dictates that a strategic level certification is needed for professionals to effectively implement innovative supply strategies throughout their entire organization. Having the current certifications will be a milestone for those professionals who take ownership of their careers. Surveys indicate those with professional designations report higher annual compensation than those without certification.

The CPSM® credential requires recertification every three years with 60 Continuing Education Hours (CEHs). For additional information visit the ISM website www.instituteforsupplymanagement.org.

Certified Purchasing Manager (C.P.M.) Program

The Certified Purchasing Manager (C.P.M.) is no longer available for testing and has become recertificationonly status. You must have already successfully passed all four modules of the C.P.M. in order to apply and achieve the designation.

Those already holding the C.P.M. designation may continue to apply for recertification. If your C.P.M. lapses beyond the one year grace period, you will not be able to reinstate your C.P.M. designation. Individuals who have earned their C.P.M. designation are required to be recertified every five years. To be recertified, an applicant must earn 84 Continuing Education Hours (CEHs) during their current certificate period. Individuals may also apply for Lifetime certification and must document at least 18 years of full-time professional supply management experience.



CERTIFICATION COURSE CALENDAR

CERTIFICATION REVIEW CLASSES - How ISM-New York Can Help

ISM-New York can help you with your professional qualification exam process if you attend certification review seminars taught by our highly qualified and trained instructors. Review classes or exams do not have to be taken in sequence.

These courses are designed as a review for supply management professionals who wish to attain their certification qualification. They enable candidates to assess the knowledge they have acquired through education and experience against the content areas covered by the three certification exams. Each course covers content from the CPSM® Study Guide and the ISM Professional Series with a focus on exam content where candidates may expect the most questions. Through case studies, questions and group discussions, candidates will have the opportunity to cement their learning and to identify areas for further study using identified ISM® materials (available on ISM's website) and other resources.

The CPSM® Study Guide is a required text for all of the review courses. ISM-New York members who register for all three certification exam courses will be provided with the CPSM® Study Guide in advance of the date of the program. It is the responsibility of the participant to purchase their own Study Guide if they only register for one class. To get the most out of the program, it is strongly suggested that the Study Guide be read thoroughly prior to the course.

Certification Class Content

<u>CPSM® Exam 1 Review Class – Foundation of Supply Management</u>

Review Seminar Instructor: Sal Vitale, C.P.M.

Review Includes *

Contracting and Negotiation, Cost and Finance, International, Social Responsibility, Sourcing, Supplier Relationship Management

CPSM® Exam 2 Review Class - Effective Supply Management Performance

Review Seminar Instructor: Judah Seidman, CPSM, CPSD

Review Includes *

Forecasting, Logistics, Materials and Inventory Management, Organization/Department Assessment, Planning, Product and Service Development, Project Management, Quality

CPSM® Exam 3 Review Class - Leadership in Supply Management

Review Seminar Instructor: Sal Vitale, C.P.M.

Review Includes *

Leadership, Risk and Compliance, Strategic Sourcing

- * Denotes In addition to exam-specific content, the following topics will also be reviewed:
 - ✓ Why and How the CPSM® was Developed
 - ✓ Certification and Recertification Requirements
 - ✓ Cost, Registration and Application Information
 - ✓ Content of the CPSM® Exam
 - ✓ Characteristics and Technical Properties of the Exam
 - ✓ The Exam Scoring Process
 - ✓ Types of Exam Questions
 - ✓ Reference Materials for Additional Study and Preparation
 - ✓ Distribution of Questions Within Exam
 - ✓ Test-Taking Hints and Tips

CERTIFICATION COURSE CALENDAR

CPSD™ Exam Review Class

Review Seminar Instructor: Judah Seidman, CPSM, CPSD

Review Includes and not limited to*

Social Responsibility, Defining Supplier Diversity Program, Effective Goals and Recognized Programs, Key Issues and Accountabilities, Personal Involved, Concepts of a Supply Management Department, Investing in Suppliers and Supplier Certification Process, Understanding the Business Planning Process, Customers and Diversity, Strategic Decisions and Risk Framework, Tier I & II Suppliers.

Certification Review Class Pricing & Date Information

CPSM® - Register for All Three CPSM® Review Classes (includes CPSM® study guides) \$1,000 ISM Members \$1,200 Non-Member

Review Course for Exam 1, 2, 3 (individually) & CPSD™ \$400 per seminar, ISM Members \$500 per seminar, Non-Member

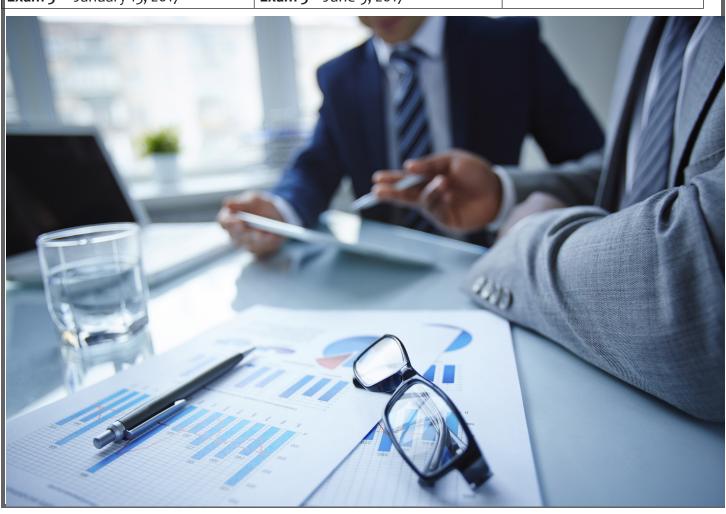
Fall – Winter Exam Class Review Dates:

Exam 1 – September 9, 2016 Exam 2 – November 3, 2016 Exam 3 – January 13, 2017

Winter – Spring Exam Class Review Dates:

Exam 1 – February 24, 2017 Exam 2 – April 6, 2017 Exam 3 – June 9, 2017 CPSD™ - Exam Class Review Date:

February 2, 2017



<u>COURSE NAME</u>: Building the Foundation - Fundamentals of Procurement

DATE & TIME OFFERED: September 15, 2016 9 am - 4:30 pm

INSTRUCTOR: Melissa Drew, PMP

ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: Procurement organizations continue to recruit new talent. Sometimes that's done within the procurement area, but often it can be from other areas of the organization. These new procurement professionals aren't always provided the full training and education that can help ensure their success. This one day workshop is focused on providing new procurement professionals with a solid foundation to build upon or providing existing procurement professionals the opportunity to expand on their experience by learning a new procurement category.

This course will teach a procurement methodology using a real work category, which can be used as a template.

Topics Covered: An introduction and expectations of today's procurement organizations will be discussed. Participants will review strategic opportunity assessments in conjunction with spend visibility and learn how they work together. You will learn how to translate the meaning of the data to develop a Request For Proposal (RFP) strategy. A review of spend data, category profiles, and supplier profiles are included in this course. The attendees will look at all aspects of the process including making a transition from category strategy to RFP strategy, developing category criteria and weighting, and building basic supplier negotiation techniques. Participants will use a case study to review and learn concepts.

Comments from ISM members who have taken this course:

"I recently transferred to my company's procurement department work on vendor management. This course provided me a foundation."

NEW

<u>COURSE NAME</u>: Consortium Buying - The Who, What, Where, Why

and When

DATE & TIME OFFERED: September 22, 2016 9 am - 4:30 pm

INSTRUCTOR: Judah Seidman, CPSM, CPSD

ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: Consortiums need to identify those suppliers and service providers that are capable of meeting the demand at the required level of quality and service. The members should select suitable contract types depending on the structure and needs of the consortium. Consortiums should also focus on continuous supplier involvement in the procurement process; as suppliers can provide valuable market information and consumption rates. An effective consortium will provide supply cost data and recommend affordable alternatives. Group members should have similar levels of influence on group activities and decisions, especially in small and intensive group types.

Topics Covered: This day long class will provide insight into how to make consortium buying successful by ensuring fair allocation of cost and gains amongst all the members. The course will also explain how to build trust between member companies (the single most critical factor for the success of any consortium) for the proper functioning of a consortium, as well as techniques and the best way to structure a buying entity that will benefit all members equally. The 7 hour session will describe methods for effective project management and team building and will include case studies and interactive exercises to reinforce consortium concepts.

NEW

COURSE NAME: Next Steps in Sourcing Techniques and Technologies -

Advanced Strategic Sourcing

DATE & TIME OFFERED: October 6, 2016 9 am - 4:30 pm

INSTRUCTOR: Joanna Martinez

ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: Once the obvious categories are sourced, how do you continue to drive value? How do you create agile networks for the supply chains you support? This course is designed for people who already have a basic understanding of a Strategic Sourcing process and want to understand how to penetrate more areas of spend and achieve better results. It deals with some of the new challenges facing procurement professionals, like "balance of trade" issues and adequate risk management.

Topics Covered: This course covers topics and challenges that confront senior, experienced procurement professionals, for example:

- o Differences in approach between goods and services procurement
- Negotiating the "hard stuff" upfront
- o Why eProcurement is important
- When to conduct a reverse auction
- Demand management
- o Incorporating "Balance of Trade" demands
- o Growing your leverage when should you consider corporate buying groups?
- Finding the "crazy idea" that brings value to your firm
- Risk management challenges

NEW

<u>COURSE NAME</u>: Best Practice Skill Sets - Leadership, Conflict Resolution, and

Change Management in Supply Chain Professionals

DATE & TIME OFFERED: October 14, 2016 9 am - 4:30 pm

INSTRUCTOR: Tom Cook

ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: As experienced supply chain professionals, those of us with the strongest "soft" skills often achieve greater success, and as a result, are more valued by our organizations and suppliers. How do we lead and not just manage? How do we head off unnecessary conflict and equip ourselves to resolve necessary conflict? How do we line up support to manage change and help our organizations find value in the disruptions occurring in most industries? This seminar will build your best practice skill sets in leadership, conflict resolution, and change management, all within a supply chain management context.

Topics Covered: This seminar is divided into three equal parts:

- 1) Leadership = Gain an understanding of the similarities and differences between leadership and management, and how both skills are critical to successful supply chain management. Topics covered include the psychology of leadership, emotional intelligence (EQ), day-to-day practical applications, and the steps we can take to become better leaders and managers.
- **2) Conflict Resolution** = Learn how to eliminate unnecessary conflict and confidently resolve necessary conflict rather than avoid it. Topics covered include leveraging your leadership skills to head off and resolve conflict, understanding different conflict management styles, reducing the negative stress that often comes with conflict, and applying conflict resolution techniques.
- **3)** Change Management = Develop skills to manage change. Topics covered include seeing change as a positive rather than a negative, leveraging leadership and conflict resolution skills when managing change, and utilizing a blue print for successful change management.

Experienced supply chain professionals will walk away with solution-based tools and techniques in all three "soft" skills.

NEW

COURSE NAME: Disrupt the Status Quo - Selling Yourself as a Procurement

Professional

DATE & TIME OFFERED: October 27, 2016 9 am - 4:30 pm

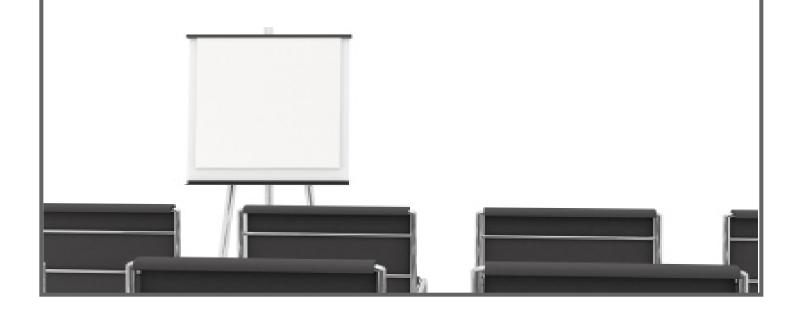
INSTRUCTOR: Joanna Martinez

ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: In most organizations, internal clients can make buying decisions that bypass procurement. How many times have you heard, "They did that project and didn't include us"? How do you get an organization that's already successful to better utilize their procurement team? What if there's no "burning platform"? This course is designed for people who want to improve their sphere of influence, breadth of projects, and impact to their organization. The seminar provides ideas on how to increase your visibility in the organization and how to impact the extent to which procurement is utilized.

Topics Covered: Learn the steps to becoming a Trusted Advisor by dissecting and analyzing the real roles of various stakeholders – who really needs to be on your side? Discuss why a "Top Down" approach isn't always the best. Develop a Day One plan for when you return to the office by discussing real "best practice" case studies from the field and adapting the success of others to your particular corporate culture. You'll walk away with ideas on the right categories to tackle, the right people to engage, how to approach them, and how to be prepared for success. For anyone willing to share, we'll discuss your particular challenges and apply what we've learned in class to help you develop your own plan.



COURSE NAME: Developing and Mastering Your Negotiation Skills

DATE & TIME OFFERED: November 2, 2016 9 am - 4:30 pm

INSTRUCTOR: Tom Cook

ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: Almost every supply chain professional has responsibilities which include negotiating agreements, contracts, pricing and developing supplier relationships. The better they can negotiate, the better they can control terms and conditions for the company's best interest while reducing costs.

Negotiation is both an art and a science that can be mastered. This class offers the supply chain professional developmental options for their skill set that will position them with the best opportunity to gain advantage.

Topics Covered: Participants will be reviewing many techniques to assist and teach the art of effective negotiations, breaking through barriers as well as reviewing tactical approaches to negotiations. Knowing what to say in the negotiations is important but knowing what NEVER to say is just as important. This seminar will teach participants how to recognize when negotiation tactics are being used on you, creating a win-win approach and review negotiation glossary key words.

Comments from ISM members who have taken this course:

[&]quot;The seminar was very encouraging and enlightening. I can use a lot of what I learned in my daily task."

[&]quot;Tom was filled with knowledge. Very informative and a great instructor. Content was endless."

[&]quot;Very good. Discussions in detail was very useful."

[&]quot;Used real life cases instead of just boring textbook talk."

[&]quot;Best instructor I have had yet. A lot of one on ones and genuinely enjoyed helping the students with real life issues at work."

[&]quot;I would recommend to anyone that that's in sourcing/purchasing to take this seminar."

[&]quot;Fantastic course and will be participating in another course with this instructor."

<u>COURSE NAME</u>: Contract Law 101 – Legal Aspects of Procurement &

Supply Management

DATE & TIME OFFERED: November 10, 2016 9 am - 4:30 pm

<u>INSTRUCTOR:</u> Martin J. Carrara, Esq.

ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: This one day seminar will lay the ground work for understanding the legal aspects of purchasing. You don't need to be a lawyer to work with and understand contracts but understanding the terms commonly found in contracts and the reason and purpose behind them will make you better prepared during your next negotiation. A "must-have" for all purchasing and supply management professionals. Supply chain professionals need to understand many areas of the law that impact their responsibilities. Participants will be provided with an overview of the various laws governing purchasing and supply management. Included is an in-depth review of contract law, including the essential elements of an enforceable contract, when it is necessary to have a written contract, the "battle of the forms", the Uniform Commercial Code, warranties, what constitutes a breach of contract, remedies for breach, and other contract terms. In addition, this seminar goes beyond contract law and covers areas of the law that are critical including intellectual property laws and protecting proprietary rights, the law of agency, and antitrust law. This course, taught by an experienced commercial and transactional attorney, will help participants gain better knowledge of the role of attorneys and effective use of legal counsel for doing business while reducing risk for your employer and yourself.

Topics Covered: This seminar will cover an overview of the laws governing purchasing and supply, the role of attorneys, effective use of legal counsel, the law of agency, antitrust laws, intellectual property rights, contract law, contract formation, UCC contract terms, warranties, contract performance, breach of contract, remedies for breach of contract, allocating risk and dispute resolution.

Comments from ISM members who have taken this course:

"Yes, it has met my expectation. This course helps me with my every day duties."

"It met my expectations and beyond. I learned many things that I was not aware of."

"The instructor covered the material very well."

NEW

COURSE NAME: Supply Chain Management for Entrepreneurs

DATE & TIME OFFERED: November 17, 2016 9 am - 4:30 pm

<u>INSTRUCTOR:</u> Judah Seidman, CPSM, CPSD

ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: The entrepreneur is commonly seen as a business leader and innovator of new ideas and business processes. Entrepreneurs tend to be good at perceiving new business opportunities and often exhibit a risk-taking attitude that makes them more likely to exploit the opportunity. Supply management can help the entrepreneur by providing the tools and processes to foster innovation and risk-taking. Starting a business venture, having a good idea, or providing a good or service is generally the impetus for an entrepreneur to venture out on their own offered for sale. Supply management for entrepreneurs will provide the student with tools and concepts that can be quickly adopted and adapted for the sometimes frenetic and maverick entrepreneurial environment.

Topics Covered: This day long class will provide insight into how the supply management discipline can support entrepreneurial initiatives by applying sourcing techniques to take benefit of opportunities and, as the decision maker, decides what, how, and how much of a good or service will be produced. The class is designed to expose the student to information, experiences, and tools for improving their business acumen and giving him or her confidence in tackling issues that arise in any start-up organization.



<u>COURSE NAME</u>: Creating Effective RFPs to Deliver Excellence

DATE & TIME OFFERED: January 19, 2017 9 am - 4:30 pm

INSTRUCTOR: Tom Cook

ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: The RFP (Request for Proposal) process can be time consuming with many details to consider. But a successful outcome can bring sizable cost savings and process efficiencies. Are you conducting your RFPs as effectively as possible? This workshop will provide significant insight into the RFP Process. Learn to achieve excellence with common best practices and develop true partnerships with vendors and suppliers. How do you select which suppliers to invite for participation? What is the right amount of information to provide to bidders, and how much is too much? Handle purchasing management by combining common sense, relationship building and metrics to the process. Participants will also review techniques to manage the balance of reducing costs, increasing benefits and clearly defining the goals you hope to achieve. Create secure and comprehensive documents as you master the skills of this critical supply management function.

Topics Covered: This seminar will provide insight into developing a solid approach to choosing vendors and suppliers. Manage the RFP (or RFQ) Process with greater ease and better results. You will learn how to take price out of the initial equation and assure valued based purchasing. Individuals will also review and discuss case studies in RFP such as "when the situation goes awry," "when the situation proves challenging," and "when all goes well." Benchmarking, analyzing options, price points, service parameters and leveraged options will all be covered. You'll walk away with an easy ten step RFP process for assured success including a brief review of negotiation skills and a sample RFP bid for reference.

Comments from ISM members who have taken this course:

"Quite informative and not stuffy. Instructor provided real-life examples and encouraged group participation throughout."

"Very knowledgeable instructor. Had lots of examples to apply to the topic to help you understand each stage."

NEW

<u>COURSE NAME</u>: Global Negotiation Strategies

DATE & TIME OFFERED: January 27, 2017 9 am - 4:30 pm

INSTRUCTOR: Pernilla Rorso

ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: Global negotiation is an art that requires the right understanding and appreciation of intercultural sensitivity. Your foreign counterpart has his or her own habits, customs and culture. Understanding your own cultural background against these diverse values is essential in becoming more effective in meeting your targets and obtaining positive negotiation outcomes, while at the same time managing to build a mutually beneficial long-term relationship. This course will provide you with the necessary tools to deal with the different aspects of the negotiation process across all regions of the world. By first giving insight into the influence of culture on international business, you will understand the significance of other cultures' behaviors, assumptions, reactions, and expectations on global negotiations. This course is essential for supply management professionals and will provide you with best practices in cross-cultural negotiations and enable you to develop the necessary skills to achieve successful global negotiation outcomes.

Topics Covered: This course will cover the most essential topics of global negotiations, such as necessary preparations before embarking on negotiations on an international level and identifying the influence of cultural dimensions on all stages of the negotiation process. Furthermore, you will learn how to make contact and build rapport with members from different cultures in addition to building trust and communicating across cultures. You will also be provided with a solid understanding of cross-cultural negotiation tactics and issues related to power, control, conflicts, expectations, preferences, ambiguity, agreement and conclusion, among others, allowing you to identify specific cross-cultural challenges and their solutions.

COURSE NAME: Cost Analysis Concepts

DATE & TIME OFFERED: February 10, 2017 9 am - 4:30 pm

INSTRUCTOR: James V. Kelly, C.P.M.

ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: This seminar provides a hands-on, highly interactive discussion on how supplier cost factors can be estimated and used to the buyer's advantage in negotiation. Too often, pricing negotiations with suppliers are based on "haggling" and "pencil sharpening" requests by buyers. Cost Analysis Concepts provides a fast paced, one-day seminar that shows participants how to break down all the components of supplier costs to calculate the "should-cost" price, thereby allowing for a fact based negotiation.

Topics Covered: During this seminar participants will learn what Cost Analysis is and the principles associated with it. Having a better understanding of the cost concepts and evaluating the cost vs. price analysis will allow the supply chain professional a better negotiation. Other areas covered in this seminar will be the total cost of ownership, cost analysis in the service sector and identifying cost drivers. Time will also be spent reviewing elements of cost and the tools of cost analysis (worksheet).

Comments from ISM members who have taken this course:

"It opened my eyes to different ways at looking at a situation and being able to budget. Either stick to the budget or come in below budget."

"I learned several things that I did not know. It helped me to be aware of some of the questions I should be asking."

"The course was interesting and informative!"

COURSE NAME: Vendor Audits and Assessing Vendor Risks

DATE & TIME OFFERED: February 23, 2017 9 am - 4:30 pm

INSTRUCTOR: Tom Cook

ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: In today's world, although risk is a part of the equation when it comes to supply chain management, risks can be minimized by proactively planning for unexpected shifts in companies. This seminar on vendor risk management (VRM) provides a breakdown of how to identify those risks before they arise, how to assess their impact and ultimately how to overcome them. Participants will learn to provide a comprehensive view of risks related to third-party relationships and align VRM activities with broader risk management programs. We will identify, manage, and mitigate vendor risks, while discussing various models for on-going vendor risk management activities.

Topics Covered: This seminar teaches participants a balanced consideration between two distinct aspects of an audit: transactional vs. transformational. You will learn how a collaborative culture with your vendors and within your own company's functional areas (i.e., Purchasing, Engineering, Finance) helps enhance the commercial relationship and ultimately reduces risk. Through the Vendor Audit process, participants will learn techniques that can improve their communication and relationships with key vendors. Vendor Audits can deliver transactional change, while Program Reviews have the ability to make sustainable, transformational changes within your supply base and organization. These skills will allow you to take a proactive approach for continued success. The instructor will show how you can utilize metrics and formulas for assessing vendor risk and how to proactively develop working relationships with vendors to assure compliance, sustainability and cost effective structure.

Comments from ISM members who have taken this course:

"I enjoyed this course very much. I learned a tremendous amount about vendor management."

"The instructor did a great job at presenting and giving a lot of practical examples."

<u>COURSE NAME</u>: Advanced Purchasing Management (2 Day Seminar)

<u>DATE & TIME OFFERED:</u> March 29-30, 2017 9 am - 4:30 pm

INSTRUCTOR: Tom Cook

ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: Advanced Purchasing Management is designed for seasoned procurement and sourcing personnel who wish to advance their skill sets and capabilities to the next level in Purchasing, Sourcing, Vendor Management and Risk Mitigation. Discussion and teachings on key topics create a "Best Practice" approach to procurement management.

Topics Covered: This seminar will provide insight into developing a solid approach to raise the bar of procurement expertise and integrate best practices into your purchasing and sourcing management program. The instructor will provide instruction on improving vendor relationships and moving from a strategic to a tactical management style. You'll develop sophisticated techniques to become a highly skilled negotiator. Developing improved forecasting skills, better project management capabilities and global sourcing modeling will further increase your purchasing expertise.

Agenda: Includes and not limited to:

Day 1

Defining your role in Procurement and Sourcing
Managing Corporate Silos and Fiefdoms
Understanding "Enterprise" versus "Transactional" Purchasing
Creating a Purchasing Mantra
Case Studies in Procurement and Sourcing Management
Problem Resolution

Day 2

International/Global Sourcing Management
Leveraging Technology and E-Commerce products
Obtaining Better RFP Results: Workshop in Reviewing a 20 Step Process
Managing SOW's and Vendor Agreements: Avoid Costly Mistakes
Case Studies in Vendor Relationships
Managing Vendors for Long Term Agreements
Advanced Negotiating for Better Results
Management of a Purchasing Team

COURSE NAME: Contract Drafting for Supply Management Professionals

DATE & TIME OFFERED: April 6, 2017 9 am - 4:30 pm

INSTRUCTOR: Martin J. Carrara, Esq.

#ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: This seminar applies the principles of contract law to the contract document. This course, taught by an experienced commercial and transactional attorney, will help you gain better knowledge of how we can use the agreement as a tool to monitor and manage supplier performance and manage change control and contract compliance. In taking this seminar you will learn how to draft contracts, including how to structure contract provisions, draft contract language to ensure enforceability avoid ambiguity, and how to use form agreements and contract drafting systems. Participants will learn the objectives of a good contract, the various forms of contract, and the "anatomy" of a contract - why contracts are structured the way they are and the function and purpose of the various parts. Participants will gain an in-depth understanding of the terms and conditions in agreements, as we explain the legal reasons for the various terms, why we take certain positions from the purchaser's perspective, and how to negotiate key issues that suppliers typically raise.

Topics Covered: This class is intended to be more hands on with a workshop format than other contract development seminars, and it will include break-out sessions and class exercises in drafting and reviewing contract language. Preliminary Drafting Considerations, Using Recitals and Definitions, Structuring Contract Provisions, Conditions, Options and Obligations, Avoiding Ambiguity and Litigation, Drafting Key Contract Terms, Using Form Agreements and Dealing with Boilerplate Terms and using contract drafting and assembly systems will be covered.

Comments from ISM members who have taken this course:

"The instructor was very good. He knew how to present the subject matter in a way that would appeal to a diverse audience, worked to engage the audience, etc."

"Marty was great. He was so good that I had flashbacks to law school and started to panic at one point. $\stackrel{\smile}{\smile}$ "



Answering question to expectations "yes, it did and I have a better understanding of the legal language used in the contracts."

COURSE NAME: Optimizing Cross-Cultural Communication for Effective

Outsourcing (Offshore/Nearshore) Management

<u>DATE & TIME OFFERED:</u> May 5, 2017 9 am - 4:30 pm

INSTRUCTOR: Pernilla Rorso

ISM CREDITS: 7 continuing education hours

COURSE DETAILS

Course Description: In the 21st Century, information technology outsourcing (ITO), business process outsourcing (BPO) and knowledge process outsourcing (KPO) continue to constitute important strategies for international and multinational organizations (MNCs). It is through outsourcing, companies are able to meet the ever-changing requirements in highly turbulent, dynamic and fiercely competitive global business environments and secure both long-term competitiveness and profitability. Outsourcing benefits across geographical borders can fail to materialize due to severe cultural risks and challenges. These challenges need to be acknowledged, addressed and managed for offshoring/nearshoring initiatives to be successful.

Topics Covered: Participants will learn to identify, address and mitigate cultural risks with tested tools and intercultural management best practices. The workshop highlights and addresses the cultural risks and challenges between several key countries where outsourcing commonly flows, e.g. from the US to India, China, Mexico etc. The instructor will survey participants in advance to be sure regions of relevance are included. Through the 6-D Model®, based on Professor Geert Hofstede's global study of cultural differences and similarities between countries, and real-world examples, the critical issues and best practices related to offshoring and nearshoring will be taught.

Content Examples:

The Culture Compass™ Survey: This survey will measure a participant's personal preferences in terms of the 6-D Model® iAll participants will receive an individual report containing personal recommendations based on a participant's answers and the nature of the business relationship (subordinate/colleague/superior/negotiator/person transferring know-how) in comparison to the culture of interest.

Introduction to Intercultural Management - The 6-D Model[©]: Highly interactive presentation with exercises and quiz questions. This model of Professor Geert Hofstede gives the participants a framework for how to deal with cultural differences in outsourcing. Focus on leadership, decision-making, control, planning, project management, communication, co-operation, knowledge sharing, and motivation, etc.

Outsourcing Best Practices! Optimizing the Nearshoring/Offshoring Process from an Intercultural Management Perspective (India, China, Mexico and selected additional countries). Focus on leadership, decision-making, control, coordination, profit vs. cost centers, communication, knowledge transfer/sharing, project management, effectiveness and efficiency, performance management, and results.

Key Objectives - For participants will:

- Understand different ways of functioning across cultures and how to adapt to them to gain in efficiency
- Obtain a common frame of reference and platform, to allow cultural issues to be addressed objectively, explicitly and effectively
- Increase their awareness of cultural differences in relation to selected outsourcing destinations
- Understand the critical issues related to offshoring/nearshoring
- Be equipped with competences to be able to identify effective solutions in a culturally diverse environment
- Increase their effectiveness and optimize their performance in a global business environment

INSTRUCTOR BIOGRAPHIES



Martin J. Carrara, Esq. is the Senior Corporate Counsel at Pfizer Inc. where he provides legal counsel for the Pfizer Consumer Healthcare (PCH) business unit, transactional support for PCH and sales and marketing support for nationally recognized consumer healthcare brands. Mr. Carrara joined Pharmacia & Upjohn Company in 1998 where he was the primary counsel for global procurement and real estate. He joined Pfizer in 2003 when Pfizer acquired Pharmacia, where he served as the primary counsel for global contract manufacturing and supply (direct procurement), and provided counsel for indirect procurement and sales and marketing. He moved to Wyeth in January 2009 and rejoined Pfizer in October 2009 when Pfizer acquired Wyeth. He previously held senior supply and contract management leadership positions with Citibank, NYNEX (now Verizon), and L.K. Comstock and Co. Mr. Carrara is the

author of the ISM Contract Development and Administration Workbook and co-editor of the "Legal Aspects of Purchasing" chapter in The Purchasing Handbook, 6th Edition. He is a former member of the Board of Directors of the New Jersey Corporate Counsel Association (NJCCA) and he is the former chair of the NJCCA Commercial Law Committee. He is a former member of the ISM Ethical Standards Committee and a contributor to the revised Principles and Standards of Ethical Supply Management Conduct., former President of ISM-New York, and the 1995 recipient of the ISM-New York J.H. Leonard Award. Mr. Carrara holds a J.D. from Fordham University and an MBA from Wagner College. He is a member of the New York and New Jersey Bars, and is a Lifetime Certified Purchasing Manager (CPM.)



Thomas A. Cook, is Managing Director of Blue Tiger International, (bluetigerintl.com) a premier international business consulting company on supply chain management, trade compliance, purchasing, sales and business development, global trade and logistics. Tom was former CEO of American River International in NY and Apex Global Logistics Supply Chain Operation in LA. He has over 30 years' experience in assisting companies all over the world manage their global operations. He is a member of the NY District Export Council, sits on the board of numerous corporations and is considered a leader in the business verticals he works in. Tom has been engaged by the AMA since 1981. He has been a course developer and leader/instructor in a host of areas, such as but not limited to: Project Management, Import and Export,

Global Supply Chain, Purchasing, Risk Management, Negotiation Skills, Sales, Marketing and Business Development. He has now authored over 19 books on Global Trade and is in the middle of an 8 Book Series, Titled ... The Global Warrior ... Advancing On the Necessary Skill Sets to Compete Effectively in Global Trade. He has also authored books on Sales Management, Customer Service, Purchasing and Growth in World Markets. Tom has been or is involved with a number of organizations in education and training in a number of industry verticals ... such as but not limited to: ISM, CCSMP, TIA, AFA, US Chamber of Commerce, Department of Commerce, Conference Board, SUNY, Dale Carnegie, Cal State Long Beach and NYIT. Tom is also the Director of the National Institute of World Trade (niwt.org) a 30-year-old educational and training organization, based in NY. Tom is a former U.S Naval and Merchant Marine Officer. Tom holds a BS and Masters in Business from SUNY Fort Schuyler, Maritime College. Tom can be reached at tomcook@bluetigerintl.com or 516-359-6232.



Melissa Drew, PMP is Manager with KPMG, Inc. with 20 years of industry and consulting experience. She works with Fortune 300 clients to achieve sustainable growth across procurement and organizational transformation with measureable results to increase return on investment. Ms. Drew is a mentor and advisor to small, diverse-owned organizations, and has served on the Northeast WPEO Diversity Certification Committee. She speaks periodically at industry conferences for ISM and Procurecon. Ms. Drew received her Master's Degree in Management Information Systems at Auburn University, has a Paralegal degree, and holds a Project Management Professional (PMP) Certification in Information Technology. Melissa is currently the Committee Chair for Consumer Goods & Retail sourcing group with the purpose

to bring forward education and relevant topics within the industry to its members. In 2015 and 2014, Ms. Drew was awarded Supply & Demand Chain Top Providers to Know.

INSTRUCTOR BIOGRAPHIES



James V. Kelly, C.P.M., is the CEO of JVKellyGroup, Mr. (Jim) Kelly has been extremely active in charting the course of major corporations in expense and risk management solutions. He was formerly Managing Director of Global Purchasing Operations and eSourcing at Deutsche Bank, Team Leader in the Sourcing and Strategic Relations practice area at Deloitte Consulting Group and Vice President of Purchasing Operations at Citibank. Mr. Kelly is a featured speaker at seminars concerning the use of applied intelligence and technology in expense management. He is past President of ISM-New York and past Chairman of the Huntington Chamber of Commerce. Mr. Kelly is the former host of "Kelly's Corner" on New Talk Radio

540 AM and can be currently seen as a panellist on FIOS1 TV – "Money and Main Street". His honors include being named in Supply & Demand Chain Executive Magazine as a "Pro to Know" since 2007 and received the ISM-New York J.H. Leonard Award.



Joanna Martinez, Supply Chain Advisors, LLC, is a global procurement / supply chain leader and the founder of Supply Chain Advisors LLC. She is a frequent lecturer and blogger on procurement topics and also provides coaching, strategy development, training, and cost reduction opportunity assessment. Joanna has led transformation initiatives for companies in different sectors: among them Johnson & Johnson (consumer products, pharmaceuticals), Diageo (beverage), AllianceBernstein LP (financial services) and Cushman & Wakefield (real estate services, property management). She creates ways in which procurement and supply chain improvements help grow a business's bottom-line, bringing innovations in approaches and techniques to the industries in which she works and the people she coaches. Joanna has

also held client-facing roles, effectively giving her the opportunity to "sit on both sides of the table."

Joanna often presents at professional events on supply chain topics and has been a guest speaker at Columbia and De Paul Universities. She was twice designated a Supply and Demand Chain Executive "Pro to Know" and was named a Distinguished Alumna by Rutgers College of Engineering, her alma mater. She now sits on the School of Engineering's Industry Advisory Board. Joanna was the first recipient of Iasta's (now Determine) Client Excellence Award and has also been recognized for innovation or customer excellence by American Express, Egencia, and Heublein. Her blogs can be found on the websites of several technology companies. She was recognized by the New Jersey ISM with its Crystal Award in 2009.



Judah P. Seidman, CPSM, CPSD, C.P.M., currently leads the software sourcing team for ChainIQ; an independent, internationally active company headquartered in Switzerland and offers comprehensive end-to-end procurement solutions. Judah is responsible for all aspects of software sourcing including gathering technical and business requirements, global coordination on standards and benchmarks, contract compliance, renewals, expense reduction initiatives, master contracts negotiations and compliance.

He works closely with the front office, operations and legal groups to provide insight and research on software products and industry developments. Mr. Seidman holds an MBA in

public policy from the University of Maryland, and a BA in economics, cum laude, from Yeshiva University in New York.

INSTRUCTOR BIOGRAPHIES



Pernilla Rorso, Ph. D. Fellow and M.Sc. in International Business Strategy, since joining itim International in 2007 as management consultant, has focused on intercultural issues and management (ICM) from a strategic and operational perspective and she works with MNCs around the world in such areas as outsourcing, international project management and leadership. Pernilla is particularly interested in intercultural management from a performance perspective; as a driver for efficiency and profitability as well as employee motivation, engagement and satisfaction. Pernilla is currently pursuing her Ph.D. Her research revolves around the relationship between cultural

values and performance. In addition, Pernilla works in the field of organizational culture and strategy (OC) and she has developed the 'itim Global Virtual Management – Leading and Working at Distance Successfully© course. Pernilla Rorso has studied at the Copenhagen Business School (CBS), DK; The Richard Ivey School of Business (UWO), CA; Stanford University, US and Aarhus University, DK. Pernilla is trilingual – English, Danish and Swedish and speaks French and German.



Sal Vitale, C.P.M., is Marketing Procurement Category Lead at Johnson and Johnson. Sal is responsible for optimizing spend and maximizing marketing investments to build brand value. He develops and drives negotiation strategies for Marketing Services, incentive based compensation models and contractual terms. At Johnson & Johnson, prior to Marketing Procurement, Sal was responsible for managing strategic Media and Advertising Agency relationships, driving innovation, improved agency performance and business growth.

Sal has a progressive career in Marketing & Advertising Procurement in Strategic Sourcing, Stakeholder Engagement and Supplier Relationship Management at dynamic Fortune 500 companies, (American Express, CIT). He has broad experience in driving category management

strategies and improving operational efficiencies which result in maximized value, spend optimization and risk mitigation. Sal has unique experience across traditional creative advertising and emerging digital marketing channels. He partners with internal customers to understand their business requirements and goals, to facilitate procurement and expense management solutions to drive business results.

Sal graduated from Baruch College with a BBA in Business Management, received his MBA in Marketing Management from Wagner College and completed a Mini-MBA Program in Digital Marketing at Rutgers University. Former President of ISM-NY, certified CPSM instructor and was recipient of the prestigious J.H. Leonard Award. Sal is quite involved in industry leadership and educational roles with ISM and ANA, (Association of National Advertisers). He is an active member of the ANA and co-chair of The Procurement Task Force.

REGISTRATION INFORMATION

TO REGISTER

Complete the registration form below and mail with check or fax with credit card information. Registration and full fee must be made in advance. If payment is not received prior confimations cannot be sent.

Seminars are held from 9:00 am - 4:30 pm approximately. All classes are held at Pfizer Inc. (42nd Street, NYC). Confirmations with logistics for the registered seminar will be sent one week prior.

SPECIAL TEAM DISCOUNT

A 10% discount on Professional Development Courses can be provided to any organization with three or more members attending the same seminar. This does not include certification courses.

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ISM-New York reserves the right to cancel any class with less than four registrants and a full refund or credit will be issued. You may transfer to a future session, send someone to take your place or cancel without penalty at any time in writing up to seven days prior to your seminar.

If you provide ISM-New York with less than seven days notice, or fail to attend, you will be liable for the entire seminar fee.

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The fees indicated for each program includes meeting materials, refreshments, and a light lunch.

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EMBERSHIP APPLICATION

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

MEMBERSHIP LEVELS

Regular Membership

Regular Members are voting members and hold Associate Members are non-voting members and hold membership in both ISM-New York and ISM. Annual membership in ISM-New York only. Annual dues are dues are \$340. There are one-time charges of \$25 for ISM-New York initiation fee and \$20 for ISM administrative fee. Total for new members \$385.

Student Membership

Dues waived for full-time students. Attach a copy of Corporate Membership. current school issued class schedule.

Associate Membership

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If you have ten or more people, please contact the Association office for the applicable rate of

STATEMENT OF ANTITRUST POLICY

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