

DFW SBLO COUNCIL MEETING & TRAINING

Wednesday - September 21, 2011
8:00 a.m. – 3:00 p.m.

Cross Timbers Procurement Center at the
Automation and Robotics Research Institute of
The University of Texas at Arlington
7300 Jack Newell Blvd. South
Fort Worth, TX 76118

<http://www.ctpc-texas.org/mapdirections.html>

Facilitators:	Ms. Thosie Varga, Chair Mr. Dennis Evans, Co-Chair
Sponsors:	Bell Helicopter, L-3 Integrated Systems, Lockheed Missiles and Fire Control, Raytheon

AGENDA

Time	Topic	Speaker
8:00 – 8:30	Registration/Continental Breakfast	
8:30 – 8:45	Welcome/Opening Remarks	Mr. Jim Randle, PTAC Ms. Thosie Varga Mr. Dennis Evans
8:45 – 9:45	SBA: <ul style="list-style-type: none">- Size Standards- New Regulations- Overview of different subcontracting plans and when appropriate- FFATA	Ms. Stephanie Lewis, Region V CMR and Size Specialist, Government Contracting (Confirmed)
9:45 – 10:00	<ul style="list-style-type: none">- Break	
10:00 – 11:00	Government Agency Update: <ul style="list-style-type: none">- Organization structure- Program Update- Acquisition trends and what to watch for	Ms. Melea Crouse, U.S. Army Corps of Engineers (Confirmed) Mr. Albert Garza, Director, Small Business Utilization Office, GSA (Confirmed)
11:00 – 11:15	Open Discussion	
11:15 – 11:30	2012 Co-Chair Nominations	Mr. Dennis Evans
11:30 – 12:15	Lunch/Networking	Box Lunch

12:15 - 12:30	Training/Upcoming Outreach Events	Mr. Dennis Evans Ms. Cathy Usztan-Bedford Ms. Kristen Lewis Ms. Lisa Coursey
12:30 – 1:30	Small Business Panel	<i>Ms. Cathy Usztan-Bedford, Moderator</i> Mr. Steve Culligan, Veterans Trading (Confirmed) Mr. Chris Schlottmann, Essner Manufacturing (Confirmed) Ms. Francella Giatrakis, Tribal Solutions (Confirmed)
1:30 – 1:45	Break	
1:45 – 2:45	Resource Panel	<i>Mrs. Nancy Walfield, Moderator</i> Mr. Jim Randle, PTAC (Confirmed) Ms. Margot Posey, MSDC (Confirmed) Mr. Gregory James, MBDA (Confirmed) Mr. Chuck Waldrop, SBDC (Confirmed) Ms. Gerry Cartwright, NADC (Confirmed)
2:45	Closing Remarks	Mrs. Thosie Varga Mr. Dennis Evans

BIOGRAPHIES

**Thosie Varga, DFW SBLO Council Chair
Supplier Diversity Liaison Officer
L-3 Integrated Systems**



Thosie Varga is the Supplier Diversity Liaison Officer for L-3 Integrated Systems and L-3 Corporate Small Business Team Lead.

Mrs. Varga is responsible for development, implementation and maintenance of the Comprehensive Small Business Subcontracting Plan, increasing awareness to all departments within L-3 Integrated Systems, counseling suppliers, establishing initiatives that will enhance subcontracting bidding opportunities for small business concerns and ensuring L-3's compliance and performance to all Small Business goals.

In addition, as the Corporate Small Business Team Lead, she facilitates monthly meetings for other L-3 division small business advocates, providing a forum for regulation updates, training and benchmarking.

Prior to her current position, Mrs. Varga has served various positions; SBLO and Lead Logistics Supply Specialist for a Bell Helicopter Textron subsidiary, Senior Buyer for Northrop Grumman and Production Control Manager for a Veteran Owned Small Business specializing in Machining and Metal Fabrication.

**Dennis Evans, DFW SBLO Council Co-Chair
Small Business Liaison Officer
L-3 Link Training & Simulation**



Dennis Evans is the Small Business Liaison Officer for the L-3 Link Simulation & Training Division located in Arlington, Texas.

Mr. Evans is a Veteran of the United States Air Force. Upon his completion of duty, he joined Link's Procurement department in 1995, holding various positions including Expeditor, Senior Buyer, and currently as Link's SBLO over the past 5 years.

Mr. Evans is responsible for developing, implementing and maintaining Subcontracting Plans for numerous DOD programs. Additional responsibilities, include representing Link at sponsored Procurement Conferences and Trade Fairs; submitting government Small Business Reports; conduct training sessions to ensure Supply Chain personnel and Program Office are aware of federal requirements and ensuring SB, SDB, WOSB, HUBZone, VOSB, and SDVOSB are afforded an equitable opportunity to compete.

Mr. Evans is also returning Chair for the 2012 DFW Veteran/Service Disabled Veteran Summit Conference in February 2012.

**Sophia Chou, CMR & INDUSTRIAL SPECIALIST
Small Business Administration
Office of Government Contracting**



Sophia Chou joined the U.S. Small Business Administration, the office of Government Contracting (GC) in June 2010 as a commercial market representative. As a CMR, her duties include to conduct compliance reviews of prime contractors, counsel small businesses on how to obtain subcontracts, and provide orientation and training on the Subcontracting Assistance Program for both large and small businesses.

Prior to joining SBA, Ms. Chou was a Global Commodity Quality Manager at Dell in Austin. She spent more than 15 years in the high-tech industry focusing on supplier performance monitoring, compliance audit, and optimized manufacturing processes. Ms. Chou graduated from the University of Houston with master degrees in E.E. and Physics.

**Stephanie Lewis, CMR & Size Specialist
Small Business Administration
Office of Government Contracting**

Stephanie Lewis has been work with the U.S. Small Business Administration, Office of Government Contracting, for 20 years in the Glendale, California, and Dallas/Fort Worth Area Offices.

She is primarily a Size Specialist, making formal size determinations on whether a company qualifies as small or not, when a company's size has been protested. She also serves as a Commercial Market Representative (CMR) overseeing large businesses' compliance with their federal small business subcontracting plans. She has also worked in Government Contracting's other programs including prime contracting and Certificate of Competency.

Stephanie actively works with SBA HQ to develop procurement policies and regulations that affect small businesses.

**Melea Crouse, Assistant Associate Director
U.S. Army Corps of Engineers**



Ms. Melea Crouse became the Assistant Associate Director for the U.S. Army Corps of Engineers (USACE), servicing the South Pacific and Southwestern Divisions with an average obligation of \$1.8 Billion and \$3.8 Billion, respectively, in August 2007. Ms. Crouse provides small business support, management, and advice to eight districts within those divisions. Additionally, Ms. Crouse provides assistance to the Chief, Small Business Office at USACE, the Principle Assistant Responsible for Contracting (PARC) in Dallas, Texas and to the Regional Contracting Chief for each division.

From 2004-2007, Ms. Crouse served as the Deputy for Small Business Programs for USACE, Fort Worth District with an average obligation of \$909 Million dollars annually. Ms. Crouse managed the small business program, which encompassed 3 states to include occasional activity in states outside this basic service area. Ms. Crouse had the responsibility for assisting small business firms who wished to contract with the USACE as well as provided counseling, training and direction to best suit each firm based upon their capabilities. Ms. Crouse also assisted district staff regarding regulations, procedures and acquisition strategy as it related to small business. Ms. Crouse was an integral team member with the MILCON Army Transformation program, primarily at Fort Bliss; as well as the San Antonio, Base Realignment and Closure, the Customs and Border Protection Initiatives and Centers of Standardization Programs.

Ms. Crouse served as a contract specialist with the Naval Facilities Engineering Command, Southwest Division, Resident Office in Charge of Construction, Coronado; administering multi-million dollar construction projects from 1997-2004. During this timeframe, Ms. Crouse was a mentor contract specialist assisting in the administration of major renovations for the Naval Air Commands as well as successfully completing a troubled project that could have caused negative impact to the Home porting of the U.S.S Ronald Reagan.

Ms. Crouse provided administrative support for the Civil/Structural Design Branch for the Navy Public Works Center, San Diego, Engineering Division from 1990-1997. In this capacity, Ms. Crouse gained knowledge of engineering and construction that aided in her future career endeavors. In 1996, Ms. Crouse graduated from Point Loma Nazarene College with a Bachelor of Arts degree in Sociology, with an emphasis in Criminal Justice.

Ms. Crouse was born in Anaheim, California and raised in San Diego, California. Ms. Crouse currently resides in Nevada, Texas with her husband Robert, and children, McKenna and McGregor

**Albert Garza, Director for Small Business Utilization Office
GSA**



Albert Garza has been involved in government procurement at both the federal and local levels for 23 years. He started with the General Services Administration (GSA) as a Presidential Management Intern in 1988, and held a variety of positions with GSA's Federal Supply Service in Fort Worth and San Diego. In 2000, he became an economic development specialist and then contract officer for the City of San Antonio's Economic Development Department. In 2007, he returned to GSA as the Director for the Small Business Utilization Office located in Fort Worth. Mr. Garza has a B.A. and M.A. in Urban Studies from Trinity University.

**Kristen Lewis, SBLO
Triumph Group, Vought Division**



Kristen Lewis is the Small Business Liaison Officer for Triumph Aerostructures-Vought Aircraft Division's Supplier Diversity Department. She joined Triumph in June of 2008, and became SBLO in March of 2010.

Ms. Lewis' duties include establishment of small business sources for consideration of buyers, development of policies and procedures covering the small business subcontracting program, and training of Purchasing personnel in small business subcontracting areas. She is also responsible for reporting Small Business spend to the government and company management, negotiating and monitoring subcontracting plans, and counseling SB, SDB, WOSB, HZSB, VOSB and SDVOSB firm on their subcontracting opportunities. Ms. Lewis ensures company adherence to all applicable Public Laws, while bringing awareness of the importance of Supplier Diversity to Triumph.

**Lisa Coursey, Manager, Supplier Diversity Office
Lockheed Martin**



Lisa Coursey is currently serving as Manager, Supplier Diversity for Lockheed Martin's Missiles and Fire Control (MFC) business unit. She comes with 21 years of professional experience within MFC which includes 15 years experience in Materials, Subcontracts and Program Finance.

Mrs. Coursey's strong advocacy for the small business allows her to work hand in hand with MFC's procurement group in order to increase the small business foot print within MFC.

**Cathy Usztan-Bedford
Supply Chain Diversity and Preferred Supplier Programs Director
Lockheed Martin**



Cathy Usztan-Bedford

Cathy Usztan-Bedford is the Director, Supply Chain Diversity and Preferred Supplier Programs. Usztan-Bedford has been with the company since 1983 and took management responsibility for Small Business administration in 1998. In 2001, she took an expanded role as manager of Supply Chain Diversity, which included enterprise-wide responsibility for leading our Small Business focus. Currently, approximately 50 percent of all business placed falls under the Small Business program. In 2011 her role was expanded to include oversight of the Supply Chain's preferred Suppliers. Responsibilities include monitoring supplier performance at all levels in support of all programs.

Usztan-Bedford has more than 28 years experience in procurement operations and small business administration and is well respected within that community and by our Government customers. In this role, Cathy's exemplary leadership and dedication resulted in significant increase of small business subcontracting.

**Steve Culligan, Vice President of Sales
Veterans Trading Company**



During his 34-year career in the electronics industry, Steve Culligan served as Vice President of Sales for Nu Horizons Electronics and held regional management positions with All American Semiconductor and Time Electronics. Steve has an extensive small business background, having been a partner in two successful start-up distribution organizations which were subsequently sold to larger businesses. He also has technical experience as a former field application engineer for Texas Instruments Products and held a technical position with Lawrence Livermore Laboratory.

Steve earned an AAS in Electronics Technology from Salt Lake Community College.

**Chris Schlottmann, Sales Manager
Essner Manufacturing, L.P.**



Chris Schlottmann joined Essner in March 2000. He previously was Metal Fabrication Manager and Supervisor of In-Process, Receiving and Final Inspection at ATK in Rocket Center West Virginia. Chris has over 15 years experience in inspection and quality assurance in the aerospace industry. He has been in Sales & Business Development at Essner since December 2004.

Francella Giatrakis, CEO
Tribal Solutions, Inc.



Francella Giatrakis (Isleta Pueblo/Navajo), born in Albuquerque, NM is a registered tribal member of Isleta Pueblo where she lived until the age of 5. Although she was raised in Denton, TX, she and her family spent summers and holidays with her extended family in Isleta Pueblo where she continues to visit often.

Francella graduated with a BSBA degree in Accounting from the University of Alabama in 1993. Her schooling was self-funded while working at Texas Instruments - DSEG, McDonnell Douglas and Martin Marietta. After graduation, she spent 13 years in finance with diverse companies such as MBNA Information Services, Alcatel USA, Bayer Consumer Care and PepsiCo. While at PepsiCo, she gained further knowledge in Customer Supply Chain & Logistics and Category/Space Management in addition to her finance roles. Furthermore, she served as RISE President, PepsiCo's Native American employee resource group, where she led more than 500 members helping to raise awareness of Native Americans. In this role, she received recognition from the American Indian Chamber of Commerce for 2009 Corporation of the Year as well as a nomination for Walmart's external MLK Jr. Visionary Award. Francella's involvement with the DFW Native American Chamber of Commerce while employed with PepsiCo led to serving on the Board of Directors in 2010.

With an interest in aviation handed down from her father (a career pilot) and her early career in the defense industry, Francella, along with Nancy Rogers, purchased the majority shares of Tribal Solutions Inc. in 2005. At the time, Tribal Solutions Inc. was an aviation and aerospace company located in McKinney, TX. In February 2010, she transitioned to her role as CEO at Tribal Solutions which is now located in Frisco, TX. She, along with her business partner, Randy Tomplait, managed 11 full-time employees. In the late summer of 2010 and after listening and reacting to customers and their needs, the company expanded into precision machining and manufacturing through the acquisition of an existing company. This acquisition led to the addition of 19 full-time employees. In just 5 short months since the acquisition, they have added to their growing employee base 17 more employees for a total of 48 employees. Under her leadership in 2010, Tribal Solutions was nominated as SBA National Subcontractor of the Year for the 4th straight year. With her broad overall experience, Francella brings financial depth and business acumen to Tribal Solutions.

**Nancy Walfield, Small Business Liaison Officer
Raytheon**



Nancy Walfield is the Small Business Liaison Officer for Raytheon. Her role is to monitor and execute subcontracting plans and promote the practice of awarding contracts to small, minority- and women-owned businesses. Nancy participates in local and nationwide programs such as the DFW Minority Supplier Development Council, National Veteran's Conference, Government Procurement Conference, and the Women's Business Council to provide small, minority- and women owned small business owners with opportunities for economic growth and to actively seek business services that make successful subcontractors for Raytheon.

The goal of Raytheon's Supplier Diversity Program is to provide an environment that fosters the inclusion of businesses owned and controlled by minorities, women, and small businesses (including small businesses owned by minorities, women, service disabled veterans, and small businesses located in HUB Zones). Raytheon seeks to provide an inclusive environment for historically black colleges, universities, and minority institutions to participate in the procurement of technical, engineering, and research services.

One Team... One Vision

**Jim Randle, Government Contracting Counselor and Small Business Coach
Cross Timbers Procurement Center**



Jim Randle is a senior management professional with over 41 years of experience in corporate, entrepreneurial and educational environments. Jim worked for Lockheed Martin Aeronautics Company for 22 years and retired in 2004 as Supplier Diversity Senior Manager.

Jim works for Cross Timbers Procurement Center 20 hours a week as a Government Contracting Counselor and Small Business Coach. He counsels small businesses on how to sell to prime contractors and works closely with defense prime contractors to help them meet their small business goals. Jim is responsible for the success of the Cross Timbers Veteran's Initiative, Mentor-Protégé and SBIR programs.

**Margot Posey, President and CEO
Dallas/Fort Worth Minority Supplier Development Council**



Margo J. Posey is the President and CEO of the Dallas/Fort Worth Minority Supplier Development Council, a position she has held since December 1992. Ms. Posey has overall management responsibility for the Dallas/Fort Worth Minority Supplier Development Council including strategic planning, human resources, financial, planning, marketing and administration.

Mrs. Posey has been active on boards and task forces including: Southern Dallas Development Corporation Board; Dallas Business Finance Board; University of North Texas Enrollment Management Committee, Hotel W M/WBE Advisory Board, DISD M/WBE Advisory Board, Texas Instruments Advisory Board; and the YMCA. She is a proud Alumnae of Leadership Dallas and Leadership Texas. She is also on the Committee of the Board of Leadership Texas.

She has garnered numerous awards for her work including: the U.S. Department of Commerce's 2002 Minority Business Development Agency's Regional Advocate of the Year for the 11 state region including Texas; Best of Texas- *D/FW Minority Business News*; U.S. Treasury Department's "Model Program" recognition for the North Texas Commission and D/FW MBDC Mentor/Entrepreneur Program; Advocate of the Year, Plano Med-Week; Helping Hands Award, *D/FW Minority Business News*; Minority Business Advocate, New Image Business Association; Women to Watch, *D/FW Minority Business News*; Texas MBE Advocate of the Year, BOSS Symposium.

Mrs. Posey holds a B.A. degree in political science from Kent State and has completed M.B.A. course work at the University of Dallas Graduate School of Management. She holds certificates from the Amos Tuck School of Business at Dartmouth College in its Minority Business Executive Program and its Advanced Executive Program, and the Texaco Institute's Drucker Non-Profit Management Program.

Chuck Waldrop, Director
The Center for Government Contracting-SBDC
Bill J. Priest Institute Campus Of El Centro College



Dr. Charles P. Waldrop is Director of the Center for Government Contracting Small Business Development Center, a program of El Centro College (DCCCD). Dr. Waldrop works with Metroplex small businesses to help them win federal, state, and local government contracts and subcontracts. During his 40-year career in government contracting, over \$1,000,000,000 has been awarded to clients he serviced. Dr. Waldrop is an expert in all aspects of government procurement. His varied career includes 12 years as a U.S. Navy contracting officer, ten years as purchasing manager and buyer in aerospace companies, and membership on the business faculties of eleven universities. He also works to assist formerly incarcerated persons in making a successful transition from prison back to society.

Gerry Cartwright, Business Development Consultant
Native American Development Corporation PTAC

Gerry Cartwright is a Business Development Consultant currently serving as a consultant to the Native American Development Corporation PTAC that is headquartered in Billings, MT. She retired from a 38 year career at Lockheed Martin Corporation in 2005. Following 20+ years in Major Systems Procurement, she was the Site Lead for Supplier Diversity in Fort Worth. She also served her last few years as a committed Native American Business Advocate for the corporation.

During her tenure at Lockheed Martin Aeronautics, she led a team that tripled Native American business dollars. She represented all prime contractors on the USAF Native American Task Force, chaired the Small Business Task Force at Lockheed Aeronautics, and served on numerous local and national Boards of Directors. She received several awards for her work with Native American businesses including the prestigious Stellar award and the Supply Chain Management award from Lockheed Martin. She was the recipient of the Corporate Advocate of the Year Award from the National Center for American Indian Economic Development in 2004. Since her retirement, she has worked with three Native American non-profit associations, served as the Executive Director of the DFW Native American Chamber of Commerce and continues her long-time commitment to assisting Native American and Tribal-Owned small businesses with marketing to prime contractors and government entities.

Handouts

TRAINING



Alliance of Supplier Diversity Professionals (ASDP)

<http://www.asdp.us/>

ASDP Training and Certification plus Annual Meeting, \$800/person
If your 2011 ASDP dues are paid, the price is \$650.00.

Nov 8-10, 2011
Hyatt Place Dallas/Grand Prairie
1542 N Hwy 360
Grand Prairie, TX 75050
972-988-6500
www.hyattplace.com

There is one certification exam which encompasses the information contained within the six ASDP courses. Although completion of the courses is not required in order to be eligible to take the certification exam, completion the courseware is highly recommended.

Certification Levels and Prerequisites

The ASDP currently offers one level of certification: Certified Supplier Diversity Professional (CSDP).

Prerequisites for certification are outlined below:

1. **Member in good standing with the ASDP.** Yearly dues are paid in full.
2. **Educational Experience :** Minimum of B.S. or B.A. degree. A waiver of the Educational Experience requirement can be obtained by submitting an Educational Experience Waiver Form, if the applicant has worked in the Supplier Diversity field for a minimum of eight (8) years.
3. **Work Experience :** Minimum of two (2) years of employment in the Supplier Diversity field or with responsibilities in Supplier Diversity. If a waiver was used to satisfy the Educational Experience requirement, an additional two years of Work Experience is required to satisfy the Work Experience requirement.
4. **Successful completion of certification exam (70% or better) .**

The CSDP certification is valid for three (3) years from the date of the exam, after which the certification must be renewed.

TRAINING



**Institute for Supply Management (ISM)
Certified Professional in Supplier Diversity (CPSD)**

<http://www.ism.ws/certification/content.cfm?ItemNumber=20529&navItemNumber=20946>

CPSD™ Eligibility:

- 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).

Recertify every three years with 60 Continuing Education Hours (CEHs). ISM offers many options, including online courses, to earn CEHs.

The CPSD™ Exam Content:

Exams cover the major areas of supplier diversity and supply management. Please see the Exam Specifications for more detailed information.

Exam fees: **USD \$180 per exam ISM members** / USD \$265 per exam nonmembers.

CPSD™ Exam — Certified Professional in Supplier Diversity®

[CPSD™ Exam Specification](#)

120 questions, 2 hours test time

CPSM® Exam 1 — Foundation of Supply Management (For those without a current CPSM® or C.P.M.)

[CPSM® Exam 1 Specification](#)

165 questions, 2 hours and 45 minutes test time

OUTREACH EVENTS | 2011-2012 CALENDAR

SEPTEMBER 2011

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5 Labor Day
 26 [Fall TRIAD](#) Th
 27-29 [MSI/COPC 5th Annual](#)
 27-30 [MEDWeek](#)

MARCH 2012

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5-8 [DoD Mentor Protégé](#)
 2/27-3/01 [RES2012](#)

OCTOBER 2011

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30	31					

3 [DFWMSDC Golf/Tennis Classic](#)
 10 Columbus Day
 26-27 [Alamo Veterans SB Conference](#)
 26-27 [DOD SCRC Meeting](#)
 31 Halloween

APRIL 2012

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19 [Southwest Women's businessWorks!](#)

NOVEMBER 2011

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8 [Power to Potential](#)
 8-10 [ASDP Training](#)
 11 Veterans Day
 24 Thanksgiving Day

MAY 2012

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28 Memorial Day
 20-26 [Small Business Week](#)

DECEMBER 2011

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7-8 [MacDill SDVOSB Conf](#)
 25 Christmas Day

JUNE 2012

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TBD [Alliance](#)
 TBD [Business Matchmaking](#)

JANUARY 2012

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1 New Year's Day
 16 M.L. King Jr. Day

JULY 2012

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4 Independence Day

FEBRUARY 2012

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1 [Ft. Hood Conf](#)
 20 Presidents Day
 2/27-3/01 [RES2012](#)

AUGUST 2012

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TBD [Asian Business Expo](#)
 TBD [GPC](#)
 TBD [National Veterans Conf](#)