

# **THE PROCUREMENT ROUND-UP**

## **2019**

**A PUBLIC PURCHASING SEMINAR**

**December 5 & 6, 2019**

**THE MENGER HOTEL, SAN ANTONIO**



*Designed for Public Purchasing Professionals with special emphasis on the latest developments that are essential in purchasing.*

*Sponsor Packet Contents:*

- *Sponsor Invoice*
- *Sponsor Data Sheet*
- *Seminar Information*
- *Want to be a Sponsor?*
- *W-9*

# Who should take this seminar and why . . . . .



This seminar is intended to highlight the latest developments that are essential in the purchasing management of public institutions. It is critical that public purchasing officials be abreast of the current popular purchasing methods, the new rules and regulations, and the methods of evaluations to handle the modern taxpayer's attitudes, particularly in mass media articles.

This seminar is designed for directors of purchasing, purchasing agents, purchasing buyers, directors of finance, business managers, purchasing clerks, and warehouse supervisors. This program is applicable to all areas of the public sector, including counties, municipalities, school districts, junior colleges, and colleges.

The seminar is two day, a Thursday and Friday. There will be general sessions on Thursday, December 5, and Friday, December 6.

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## CERTIFICATION

### Continuing Education Credit Hours:

- A. Participants who successfully complete this program will receive fifteen (15) hours of continuing education. They may be applied toward the **ISM C.P.S.M and/or A.P.P** program requirements. ISM's consent to provide a program number for this educational event is not an endorsement of this program or its content by ISM.
- B. **Texas State Board of Accountancy (CPA's):** Participants will earn 16 continuous professional education (CPE) hours, certified.
- C. **Texas Association of School Business Officials (TASBO)** - Certified TASBO member may qualify for continuous education credit for hours attended.
- D. This seminar's Continuing Education hours may also be applied to **CPPB** Certification Program, **NIGP** Certification Program and **TASBO** Certification Program, **CPPO**.
- E. Texas Comptroller of Public Accounts certifications **CTP** and **CTPM** qualify for continuous education credit.

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## GENERAL INFORMATION

**December 5 & 6, 2019**

**Menger Hotel  
(210) 223-4361  
San Antonio, TX**

Room Rate \$149.00

**Group No: ISM-Round-Up**  
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**Parking:** For those that are not staying at the hotel, but who are commuting each day, the parking fee will be waived at no cost to the attendee.

**Hotel Room Rate:** The room rate of \$149.00 will also be available for the weekend.  
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**Registration – December 4 - 4:00 p.m. - 6:00 p.m.**  
**December 5 8:00 a.m. - 5:00 p.m. Program Schedule**  
**December 6 8:00 a.m. - 5:00 p.m. Program Schedule**

### TUITION AND FEES:

**\$375.00** Per Person for Non-ISM  
**\$350.00** Per Person for ISM Members, TASBO, NGIP, TxPPA Members and CPAs  
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**FOR MORE INFORMATION, Please Contact:**

**Adrian Garcia** Ph. (956) 266-2606

E-Mail: [office@ismrgv.org](mailto:office@ismrgv.org)

**Want to be a Sponsor for The Procurement Round-Up 2019?  
December 5 & 6, 2019 at the  
The Menger Hotel, San Antonio, Texas**

**Sponsors:** Please help support these educational endeavors

**Here's the what's, why's and how's:**

- **WHAT can you sponsor and the different options to choose from:**
  1. Sponsor a Coffee break:
    - a. There are four coffee breaks during the seminar.
    - b. We will need at least six sponsors per coffee break.
    - c. The cost will be \$200.00 per sponsor.
  2. Sponsor for Thursday Evening Reception/Networking Session-Catering
    - a. We will need at least six sponsors.
    - b. The cost will be \$350.00 each.
  3. Sponsor for Thursday Evening Reception/Networking Session-Open Bar
    - a. We will need at least four sponsors.
    - b. The cost will be \$350.00 each.
- **WHY should you be a sponsor:**
  - a. We will announce our gratitude at the beginning of the seminar and stress to the seminar registrants to support the sponsors and add to their bidders list.
  - b. The sponsor name will be displayed on the event that you are sponsoring.
  - c. Your information such as your company name, contact person, and products and service will be part of the participants binder. Thus, everyone registered, will have your company data.
  - d. A list of all participants will be available to you at no additional cost.
  - e. All sponsors of \$350.00 or more: You may request a table to display your products during the seminar, but it depends on the availability of tables and spaces. Please contact Adrian Garcia at [office@ismrgv.org](mailto:office@ismrgv.org) for availability.
  - f. You are automatically invited to be our guests to our Thursday Evening Reception/Networking Session.
- **How to register as a sponsor: simply click on the Forms button on our website [www.ismrgv.org](http://www.ismrgv.org)**
  - a. Sponsorship Packet: You click on the PDF button, print the form, check the desired sponsor event, and mail this invoice with remittance to the address indicated.
  - b. Sponsor Data Sheet: Simply do this sheet on-line and we'll have all the data we need.

**For any additional information please feel free to call or email**

Adrian Garcia, at [office@ismrgv.org](mailto:office@ismrgv.org)

Phone (956) 266-2606

ISM - RIO GRANDE VALLEY  
P.O. BOX 2047  
BROWNSVILLE, TEXAS 78522-2047  
www.ISMRGV.org

# INVOICE

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

DATE: \_\_\_\_\_

TO: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**FOR:** Sponsorship Fee for **The Procurement Round-Up 2019**: A Public Purchasing Seminar, December 5 & December 6, 2019 - At The Menger Hotel, San Antonio, Texas. It is for (check one):

- |                          |  |          |
|--------------------------|--|----------|
| <input type="checkbox"/> | Sponsor for coffee break               | \$200.00 |
| <input type="checkbox"/> | Sponsor for Thursday Night Catering    | \$350.00 |
| <input type="checkbox"/> | Sponsor for Thursday Hospitality Suite | \$350.00 |

**TOTAL FEE \$** \_\_\_\_\_

**Method of Payment:**

- Check: Remit to above address  
 Credit Card: \_\_\_\_\_ Visa/MC/AX

# \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Signature: \_\_\_\_\_

**For more information please contact:**  
Adrian Garcia at [office@ismrgv.org](mailto:office@ismrgv.org) or (956) 266-2606  
or  
Melonie Perry at [melonie.perry@tasb.org](mailto:melonie.perry@tasb.org) or 1-512-483-7127

**ISM - RIO GRANDE VALLEY**  
**P.O. BOX 2047**  
**BROWNSVILLE, TEXAS 78522-2047**  
**www.ismrgv.org**  
**Email: [office@ismrgv.org](mailto:office@ismrgv.org)**

## SPONSOR DATA SHEET

**(Please fill out and return form to [office@ismrgv.org](mailto:office@ismrgv.org))**

Company Name:

Contact Person 1:

Address:

Email:

City, State,  
Zip Code:

Contact Person 2:

Email:

Phone Number:

Contact Person 3:

Company Email:

Email:

Website:

Products:

\* Please provide additional badges for the following (besides the above 3):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

► Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>Institute for Supply Management-Rio Grande Valley, Inc.</b>		
	2 Business name/disregarded entity name, if different from above <b>ISM-Rio Grande Valley</b>		
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.		
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input checked="" type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate		
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.		
	<input type="checkbox"/> Other (see instructions) ► _____ <b>Tax-Exempt</b>		
	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):		Exempt payee code (if any) _____
		Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>	
5 Address (number, street, and apt. or suite no.) See instructions. <b>P.O. Box 2047</b>		Requester's name and address (optional)	
6 City, state, and ZIP code <b>Brownsville, TX 78522-2047</b>			
7 List account number(s) here (optional)			

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

<b>Social security number</b>										
<b>or</b>										
<b>Employer identification number</b>										
7	4		-	2	4	5	0	5	0	4

## Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

<b>Sign Here</b>	Signature of U.S. person ►	Date ► <b>1-1-2019</b>
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## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*