

## UPCOMING EVENTS

### November

- 6<sup>th</sup> Healthcare Buyers Group Meeting  
10<sup>th</sup> NAPM-Houston Dinner Meeting  
19<sup>th</sup> Seminar – “The LeaseSpeak System™: Your Guide to Saving Money on Leases” presented Mary Redmond, Independent Lease Review, Inc.

### December

- 3-5<sup>th</sup> ISM Services Conference, Phoenix  
5<sup>th</sup> St. Arnold's Brewery Plant Tour

Check out the details for all events

[www.napmhou.org](http://www.napmhou.org)

### Pre-Meeting:

#### “Effective Job Search & Placement Resources”

by Brandy Jones,  
President IQ Staffing

### New Member Orientation

### Location:

**Sheraton Houston  
Brookhollow Hotel**  
3000 North Loop West,  
Houston, Texas 77092

### Cost:

**\$27** with Reservation,  
**\$30** at the door without  
reservation

### When:

**5:00 pm** – Pre-Meeting  
**6:00 pm** – Dinner  
**7:00 pm** – Program  
**8:30 pm** – Adjourn

## November 10th General Meeting

### “Using Analytics to Manage Business Risk”

**Tim Thurston**

**Procurement Risk Manager, Hewlett Packard**

By Mara Stanfield, C.P.M.

Tim's presentation will focus on how HP uses structured contracts to manage business risk. Listed below are the major items that will be covered.

- Challenges in managing HP's supply chain
- Lack of risk mgmt processes has resulted in billions of dollars in losses for OEMs
- Objectives of PRM @ HP:  
Measure & Manage Operational Uncertainties
- PRM at HP addresses risks due to high probability events
- PRM Approach:  
Manage risks using structured contracts with suppliers
- PRM implementation at HP
- HP has obtained >\$500M in cost savings from implementing PRM
- PRM team Awards & Accomplishments

**Tim Thurston** holds a BS in Computer Engineering, a Masters of Science in Computer Science and Engineering and an MBA. Tim has worked at Hewlett Packard for 15 years, much of this time in various roles within the Supply Chain Organization.

For the past three and a half years Tim has worked in the procurement organization applying advanced analytics to the procurement processes to assure supply and gain cost advantages while mitigating excess supply.

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Recent changes in the economy have influenced some companies to require justification of memberships. Below is a list of the benefits of NAPM/ISM membership:

**Affiliate Benefits:** Garner valuable contacts within your community and keep current on the issues that affect you.

**Seminar Discounts:** Enhance your professional development and job performance with enrollment in ISM seminars. The satellite seminar series addresses various purchasing/supply management issues and is offered several times throughout the year. This live program allows interaction with speakers and peers.

**Inside Supply Management:** ISM's monthly magazine contains thought-provoking discussions and information on those topics most relevant to today's forward-thinking, strategic supply chain managers.

**Manufacturing and Non-Manufacturing ISM Report on Business: A well-respected report** considered by many economists to be the most reliable, near-term economic barometer available today. The full report is delivered to ISM members each month within the pages of *Inside Supply Management* magazine.

**Access to ISM's Web Site:** The well-defined database offers an extensive database of information and articles on supply chain management issues and offers ISM's assortment of educational products and services.

**The ISM Online InfoCenter:** The largest purchasing and supply management library around and is located at your fingertips.

**Supply Management Advocate:** Members have access to all ISM printed and electronic materials to help you within one's organizational infrastructure.

**C.P.S.M. Program:** The Certified Professional in Supply Management<sup>®</sup> is the qualification that supply management professionals strive to earn. The CPSM<sup>®</sup> will be relevant internationally and reflect the expanded knowledge, skills and abilities needed to be a successful supply management professional.

**C.P.M. Program:** The program is now transitioning into recertification -only status.

**Groups and Forums:** ISM has Interest Groups ranging from materials management to health care providers, to federal acquisitions.

**Center for Advanced Purchasing Studies (CAPS):** ISM members receive purchasing-related research studies and benchmarks free from CAPS.

**Annual ISM International Conference:** Network with 2000 peers at the only international conference devoted exclusively to purchasing and supply management. The conference attracts distinguished speakers to discuss current national and international issues and features several sessions highlighted by prominent corporate leaders.

**ISM Knowledge Center:** Members may enroll in a free course on cost/price analysis or take one of the growing numbers of other self-directed online courses and earn Continuing Education Hours toward re-certification. The above benefits are made possible to all members through National dues and are worth the money. But, to me the following benefits are the reasons I'm so active in NAPM-Houston:

**Networking:** The ability to gain valuable professional contacts within my community during monthly meetings and seminars and being a part of an association run by and for supply chain management professionals. (Cont'd on page 3)

(Continuation President's Message from page 2)

**The Online Career Center:** Searchable database of employment listings from across the country, resume posting option as well as various other career-enhancement tools.

**Friendships:** When I think about my closest friends, the majority of them belong to the association. The friendships I've made by becoming involved in the association are the biggest benefit I've received from being a NAPM-Houston member.

**NAPM-Houston** can only be the catalyst for positive changes in your career! It's up to you to have the vision to utilize the tools our association makes available.

**Kim Wren, A.P.P.**

President, NAPM - Houston, Inc.  
[kim.wren@amegybank.com](mailto:kim.wren@amegybank.com), (713) 232-2134

## Bob Engel, C.P.M. Named Southwest Forum's Volunteer of the Year

By Sharon Malkovicz, C.P.M.



Annually recognition is given to one member who has demonstrated outstanding value to the ISM Southwest Forum through dedication and continuous service as a volunteer for Forum activities. Selection is based upon merit, shown by performance that substantially exceeds expectations and sets standards of excellence and continuous service.

**Bob Engel, C.P.M.** was named the Southwest Forum's Volunteer of the Year at the 63<sup>rd</sup> Southwest Supply Management Conference, Thursday October 8<sup>th</sup> in Dallas, Texas.

Bob's outstanding contributions have been many. In the past 30 years Bob has been an active member of the Petroleum Buyers Group as well as chaired both the NAPM-Houston Golf Tournament and the Southwest Forum Golf Tournament. Over the years, he represented NAPM-Houston and the Southwest Forum as a speaker at various conferences including the ISM International conference, the Southwest Supply Management Conference, ISM Leadership Training, and upon invitation of numerous Affiliates. Sought out for his excellent presentation skills and industry knowledge, speaking invitations were extended on behalf of the Hospitality and Service Group's Conferences by ISM. In addition, Bob serves on the Chemical Group's Board of Directors. Bob is the current Chair of NAPM-Houston's 2010 Golf Tournament scheduled Thursday, May 20<sup>th</sup> at Cypresswood Golf Course.

Congratulations on your award Bob, we are honored to have you as a member of NAPM-Houston!

## Career Services Pre-Meeting November 10, 2009

By: Jonathan Heath – Career Services Chairman

**Presenter:** Brandy Jones, President, IQ Staffing, LLC  
**What:** **Effective Job Search & Placement Resources**  
**When:** Tuesday – November 10<sup>th</sup>, 2009  
**Where:** Sheraton Brookhollow Hotel  
**Time:** 5:00pm – 6:00pm

Brandy Jones is the President of IQ Staffing, LLC. She has over 10 years of experience focusing on Human Resources with a specialization in Staffing and Recruitment. Brandy received her PHR (Professional in Human Resources Certification) in 2006. Formed to identify the top performers in the purchasing and supply chain field, IQ Staffing specializes in procurement staffing for all industries. Brandy is an active member of the Society for Human Resource Management, the National Association of Personnel Services, and Inter-City Personnel Associates. She lives in Houston, Texas.

## February is Supplier Diversity Month at NAPM-Houston

By Rose Berberian, MBA, CPSM, Co-Chair Supplier Diversity Group

Be sure to make your reservations early for the February pre-meeting and dinner meeting. The pre-meeting will consist of a discussion from Supplier Diversity professionals explaining why your company needs a supplier diversity program and what you need to do to create one. The dinner meeting will continue that discussion by expanding on what you need to do and instructions on how to do it. You will not want to miss this evening full of information you can use to develop or improve your supplier diversity program.

### Supplier Diversity Group Q&A

**Question:** What is the value of subcontracting to a supplier diversity program?

**Answer:** Most corporations are large and multi-faceted. It is challenging for most small / diverse firms to find success. However, subcontracting allows for the like savvy and business appropriate firm to work on the corporate projects under the direction and leadership of a prime partner. That being said, the corporation is helping the small / diverse firm to grow. A successfully managed supplier subcontracting program can contribute significantly to the accountability measurement.

*Thank you to Marian Nimon, MBA C.P.M. for contributing to this month's Supplier Diversity Group Q&A.* Please send your supplier diversity related questions to [naphouston.supplierdiversity@gmail.com](mailto:naphouston.supplierdiversity@gmail.com).

## Congratulations On Your Tenures!

By: Laurie Oberhoff \* Public Relations & Communications Chairman

Congratulations to the following NAPM - Houston Members on their tenures for the month of October.

### 5 Years

Robert Vokurka  
 Jimmy E. Hutto, C.P.M.  
 Larry E. Watson

### 10 Years

Nina Cook

# Seminars

## November 2009 Local Seminar: “The LeaseSpeak System™: Your Guide to Saving Money on Leases”

Presented By: **Mary A. Redmond**, President of Independent Lease Review, Inc.

Are you spending too much on your equipment leases? Do you know? How often have you experienced automatic renewals or extensions? Did the first lease invoice contain a few surprises that cost you extra money?

**When:** Thursday, November 19, 2009

**Location:** Sheraton Houston Brookhollow at 3000 North Loop West in Houston, TX 77092

**Time:** 8:30 a.m. – 12:30 p.m. (Arrive 8:00 a.m. for check in)

**Member registration fee and deadline:** \$65 by Friday, November 13, 2009

For details, see link for “2009-2010 Seminars” on our website, [www.napmhou.org](http://www.napmhou.org)

## January 2010 Local Seminar: “Process Based Leadership”

Presented By: **Seth Davies**, Managing Partner/Senior Consultant, Competitive Solutions, Inc.

In this interactive session, participants will receive a lively overview of the four key elements necessary to create and sustain a high performance mentality and process throughout any organization. The presenter will focus strongly on the role of organizational leadership to create, emulate, communicate, and reinforce the non-negotiable strategies necessary to sustain business success.

**When:** Thursday, January 28, 2010

**Location:** Sheraton Houston Brookhollow at 3000 North Loop West in Houston, TX 77092

**Time:** 8:30 a.m. – 12:30 p.m. (Arrive 8:00 a.m. for check in)

**Member registration fee and deadline:** \$65 by Monday, January 25, 2010

For details, see link for “2009-2010 Seminars” on our website, [www.napmhou.org](http://www.napmhou.org)

## ISM Satellite Seminar: “Talent and Career Management for Supply Professionals”

Challenging economic conditions and uncertainty are reshaping the face of the job market and raising concerns for many workers around the globe. Supply management organizations are working to ensure that they are staffed with individuals who have the requisite competencies to meet their needs. Supply professionals are searching to find and retain positions that provide job satisfaction and career advancement. This satellite seminar will explore the talent management, career management, succession planning and other human resource challenges in today’s supply management arena.

**When:** Thursday, February 11, 2010

**Location:** Aramco Services Company  
9009 West Loop South in Houston, TX 77096

**Time:** 9:00 a.m. – 1:30 p.m.  
(Arrive 8:15 a.m. for check in)

For details, see link for “2009-2010 Seminars” on our website, [www.napmhou.org](http://www.napmhou.org).

## March 2010 Local Seminar: The 5 C’s of Excellence in Supply Chain Management

Presented By: **Sharon McGee**, Past President/CEO, R.M. Mechanical Inc.

The Five C's of Excellence in Supply Management is an inspirational examination of the skills and aptitudes necessary to excel in Supply Management; along with what it takes in willingness and hard work to develop and nurture our ability to communicate well and to be connected, conscientious, confident, and constant.

These skills are, at once, obvious and elusive, innate and arduously acquired, and difficult to achieve yet decidedly simple. They lie at the heart of any job well done; they are the jewels of our trade. Just like an old and forgotten metal supply cabinet can be a treasure trove of items seldom used, but missed indeed, each "skill" discussed (and its dazzling facets) will sparkle anew with Sharon's imaginative approach, down to earth suggestions, sense of humor and contagious enthusiasm.

**When:** Wednesday, March 10, 2010

**Location:** Sheraton Houston Brookhollow at 3000 North Loop West in Houston, TX 77092

**Time:** 8:30 a.m. – 12:30 p.m.  
(Arrive 8:00 a.m. for check in)

**Member registration fee and deadline:** \$65 by Friday, March 5, 2010

## March 2010

### CPSM Bridge Review and CPSM Regular Review

Presented By: **Dr. Russell Morey, C.P.M., CPSM**

**When:** Thursday, March 25 (Bridge only) – Friday and Saturday (Regular), March 26-27, 2010

**Location:** Sheraton Houston Brookhollow at 3000 North Loop West in Houston, TX 77092

**Time:** 8:00 a.m. – 5:00 p.m.

**Registration fees and deadline:**

Bridge - \$180 and Regular - \$180/day or \$285/both days (includes materials, continental breakfast, and lunch) by Friday, March 19, 2010.

For details, see link for “2009-2010 Seminars” on our website, [www.napmhou.org](http://www.napmhou.org).

## St Arnold's Brewery Plant Tour

**Saturday, December 5, 2009**

**What:** Plant Tour of the Brewing Facility

**When:** Saturday, December 5, 2009

**Time:** Tour starts at 1:00 pm Please arrive at 12:40. Will approximately end at 3:00pm

**Where:** 2000 Lyons Ave, Houston, TX 77020

**Cost:** \$7.00

**Other Information:** Reservations are NOT required. The tour lasts for approximately 35 minutes. After which guests are welcome to stay for a *FREE* tasting until approximately 3:00pm.

All paid attendees receive a *FREE* souvenir tasting glass. All minors under the age of 21 must be accompanied by a parent or legal guardian.

## Career Services Pre-Meeting

**January 10, 2009**

By: Jonathan Heath – Career Services Chairman

**Presenter:** John Stansfield

**What:** Resume Preparation and Techniques

**When:** Tuesday - January 10<sup>th</sup>, 2010

**Where:** Sheraton Brookhollow Hotel

**Time:** 5:00pm – 6:00pm

## Power Interview Seminar

**March 18, 2010**

By: Jonathan Heath – Career Services Chairman

**Presenter:** Jackie Abrams

**When:** Thursday, March 18, 2010

**Where:** Sheraton Brookhollow Hotel

**Time:** 6:00pm - 8:00pm

## Professional Development Committee

By: Joseph R. Britt

### Certification recipients

Congratulations to our affiliate members who recently received a certification!!

**Glenna Crites, C.P.M.** – September 16, 2009

**Sheila Smith, C.P.M.** – September 9, 2009

## Health Care Buyers Group Meeting

By: Claudia R. Garcia – Chairman

**When:** Friday, November 06, 2009

**Time:** 12:00 PM -1:00 PM

**Where:** MD Anderson Cancer Center  
1020 Holcombe Blvd. Suite 1450  
Large Conference room  
Houston, Texas 77030; 713-792-1634

**Speaker:** John Cato from Medline

## News & Notes

By: Jo Ann Prazak – Vice President

### CONGRATULATIONS!!

Congratulations to Christy Cox in her new position as Assistant Buyer at Protect Controls., Inc. Her duties include purchase of structural and gauge steel as well as all other components involved with the manufacturing of control buildings which house compressors and switchgears. Christy is pleased to be back in the manufacturing sector. We wish you every success in your new endeavor.

Congratulations to Jerry Prante who experienced first-time grand-fatherhood during the October dinner meeting when he received the phone call that his granddaughter Patricia Jean, arrived into the world. She weighed 6 lbs 15 oz. and was born at 7:38 p.m. the evening of October 13, 2009.

Congratulations to Steve Saunders, M.B.A., M.Ed., C.P.M. in his new position as Sourcing Specialist within the Sourcing and Contracts Management department at M.D. Anderson. Steve is also beginning a PhD program with the University of Texas School of Public Health majoring in Management and Policy Sciences. We wish him every success with his new job and his educational endeavors.

### GET WELL WISHES

We extend our best wishes to Kim Marcum for a speedy recovery from her recent surgery. Kim Marcum is serving as our 2009 - 2010 Awards Committee Chairman.

If you have News or Notes please contact Jo Ann Prazak, C.P.M. e-mail them to

[JoAnn.Prazak@SwiftEnergy.com](mailto:JoAnn.Prazak@SwiftEnergy.com) or (281) 423-0343

## **NAPM – Houston, Inc.** **2010 Boss of the Year Award**

It is that time of year again to start thinking about the upcoming Boss of the Year Award.

Each year in January; NAPM- Houston members are encouraged to make a nomination for their boss to be the NAPM.-Houston Boss of the Year.

The 2010 Boss of the Year Award will be presented at the February 9, 2010 General Meeting.

The deadline for nominations will be January 19, 2010 general meeting.

Forms are available at the following link:  
<http://www.napmhou.org/AwardsCommittee.htm> .

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## **NAPM – Houston, Inc.** **2010 Supplier of the Year Awards**

Each year in NAPM-Houston, Inc. the month of March is declared Purchasing Month. During the months of January and February, our Awards Committee Chairman encourages each member to submit a nomination for their Supplier of the Year, Inside Salesperson of the Year and/or an Outside Salesperson of the Year.

A nomination for all three categories is not necessary, but greatly appreciated.

In March, NAPM- Houston, Inc. recognizes the Suppliers who have performed well in their realm of duties as a Supplier and should be recognized and appreciated for their efforts. These awards are presented during the Supplier Expo at our March 9, 2010 General meeting.

Forms are available at the following link:  
<http://www.napmhou.org/AwardsCommittee.htm>

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## **Certificates of Appreciation**

Nominations can be accepted by the Board of Directors at anytime during the year. As Awards Chairman I will form a committee to review the nominations.

Remember this is not a nomination for an award, but rather a way to express both recognition and gratitude to Individuals, Companies, Members, Suppliers, etc. for their dedicated and tireless service to NAPM - Houston, Inc.

Forms are available at the following link:  
<http://www.napmhou.org/AwardsCommittee.htm>

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## **NAPM - Houston** **Career Advancement Award**

Have you recently been promoted or changed jobs?

NAPM Houston would like to recognize your accomplishment!

Forms are available at the following link:  
<http://www.napmhou.org/AwardsCommittee.htm>

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## NAPM – Houston, Inc. Welcomes Our Newest Members

By: Gail Fuselier – Immediate Past President

Summer Bartholomew  
Kirk Bateman  
Charlie Carpenter  
Jeff Counsellor  
Janelle Davis  
Patrick Dupuy, C.P.M.  
Clarence (CJ) Fetsch  
Morgan Fox  
Ashley Hughey  
Mark Mascarenhas  
Katie Moore  
Ihab W. Zakhary

### Welcome Student New Members!

Irosema Aguilar  
Aubrey Arceneaux  
Kara Armstrong  
Douglas Ayala  
Martina Bader  
Jenny Baker  
Nicole Baltzell  
Lauren Bankston  
Barrett Paul  
Molly Bass  
Kendall Bennett  
Andrew Blades  
Steven Bone  
David Bready  
Caitlin Brousseau  
Stacy Brown  
Erica Brown  
Andrew Brown  
John Burks  
James Burks  
Camilo Caballero  
Anthony Callaway  
Matt Cantu  
Natalie Cheng  
Pavel Chernatov  
Joe Chiavone  
Jason Chinnery  
Drew Collier  
Adam Curteon  
Todd Darnell  
Danny Davila  
Stacy Ehrig  
Toni Ellis  
Anna Garcia  
Rachel Garcia  
Juan M Gonzales

### Student New Members *Cont'd*

Sarah Grant  
Jordan Gray  
Brittany Gustafson  
Lauren Harabis  
Lauren Hardacker  
Justin Horseny  
Courtney Heard  
Courtney Hermes  
Sara Herrera  
Cutter Howard  
Robert Hutton  
Stephen Hyatt  
Josh Jaco  
Kyle Johnson  
Tracey Jones  
Jennifer Joyce  
Matt Keenan  
Tyler Kocler  
Stacey Kovar  
Laura Langston  
Alex Larabee  
Justine Leinweber  
Kyle Leissner  
Landon Lundberg  
Kelsey Maertz  
Angela Magliolo  
Jameson Mattern  
Matthew Mayo  
Lance McDonald  
George McKenna  
Grace Miller  
Kevin Miller  
Josh Milstein  
Jacob Molling  
Nadia Momin  
Ross Morel  
Jose Moreno  
Taylor Morgan  
James Nelson  
Trang Nguyen  
Onyi Nwafor  
Stephen Olmon  
Kelly Pepping  
Kyle Persyn  
Christopher S. Powell  
Michael Prettyman  
Chanel Quinn  
Evan Randall  
Jessica Reifschneider  
Caitlin Reynolds

### Student New Members *Cont'd*

Dan Robinson  
Annahilda Salazar  
Amy Salazar  
Daisy Salazar  
Jason Salinas  
Stacy Scardino  
Amanda Shelton  
Alan Shillingburg  
Tyler Slawson  
Daniel Smith  
Katherine Stemple  
Cody Surles  
Jenny Tanhnavong  
Terry Tate  
Alan Terlip  
Jenna Terrell  
Jennifer Tran  
Brittany Tyer  
James Uptmore  
Blake Vestal  
Ricky J. Volz  
Lindsey Warne  
Lee C. Wilson  
Jessical Wissel  
Michelle Wong  
David Wong  
Mark Woods  
Marlene Wyatt  
Vicki Zheng  
Milica Zivadinovic  
Thomas Hakala  
Adetunji Akinyinki (T Jay)  
Olivia Lynn Balababa  
Linda Barakat  
Sydney Broussard  
Dave Delgado  
Faizaan Fatani  
Mathew R. Gardner  
Eboney Lynn Gomes  
Rakiswinigri Yves Guiguemde  
Olga Hung  
Jessica Lopez  
Andy A. Luu  
Yen Ngo  
Nolan Parisi  
Jori Patton  
Fazzavna Rabbi  
Veronica E. Vielma  
Hansi Washington  
Stephen Douglas Key

# NAPM - HOUSTON BUSINESS REPORT

For further information, contact: Mike Valant, C.P.M., A.P.P. (281) 518-8575

Press Release

October 10, 2008

## HOUSTON ECONOMY IMPROVED

### Purchases Lead the Way!

The Houston Purchasing Managers Index, a leading indicator of regional production, moved up to **50.0**, marking five consecutive months of improvement in September. This is a 28% improvement since the March record low of **39.0** and the first time at or over 50.0 since October, 2008. The PMI, which indicates likely shifts in production volume three or four months in advance, now shows a signal that production has started to improve.

The PMI has a possible range of 0 to 100. Reading's over 50 indicate production gains over the near term; readings below 50, show coming contraction. September is the Houston PMI's first month at or over 50.0 after ten consecutive months in negative territory. The Houston PMI is based on diffusion indexes for eight indicators. (A diffusion index is simply the percentage of respondents reporting increases from the previous month less the percentage reporting declines.) The largest change among the eight components in September from August was in Purchases at +2, which continued to improve since the low of -43 in March. There was an overall positive 5% shift of all categories to Same from Down between September from August.

Production improved from -15 to -5 PMI in September, well ahead of the -20 in February and April. Purchased Inventory had a slight improvement of 6 points to -16 for the month. Employment remained the same for 64% of the respondents, or -23 PMI which was a great improvement from the low of -48 in March. Prices Paid (for major purchases), which fell consistently from +13 last October to a deeply depressed -48 in April, continued up to -18 in September. Purchased Inventory and Finished Goods Inventory, the two components of the PMI for which declines represent *good* news, both improved to -16 and -27 last month from -20 and -15 respectively in February.

The Houston PMI has fallen sharply over the past 12 months. In May and June last year, it posted readings above 60, a level that represents an extremely positive outlook for regional production. Before turning negative last November, the Houston PMI posted 58 consecutive months of positive readings that averaged a robust 59.1 for the past seven months. In contrast, the Houston PMI has averaged 44.3 over the last twelve months. The recent improvements of PMI components have finally taken us out of negative territory, indicating an improvement in the Houston economic picture. The rate at which regional performance declines should taper, but it definitely appears Houston has started to rebound from the worst of the economic condition.

#### Commodities in Short Supply:

N-95 Swine Flu masks, waterless soap, Lots Semiconductors, connectors, Allocations are in effect No Demand / No Supply ... Long Lead-Time, "Whatever one needs most.", none, Capacity utilization is at a high point which is increasing lead times. There is a question of how long this capacity issue will continue. Some say demand will subside – others say it will increase, None.

#### Commodities UP in Price:

Lots of commodities... cardboard boxes, connectors, Semiconductors, connectors, wire.... What is not up?, Stainless Steel, Janitorial services, Labor. Upswing on some of building supplies, Copper is up. Steel just a little, Steady, Forklift batteries, lubricants, ERW Pipe, All of the "ethylene" family of chemicals.

#### Commodities DOWN in Price:

Linerboard still slipping further, "a thing of the past", Copper, Computers and accessories, base oils.

#### September, 2009

	UP	SAME	DOWN	N/A
Sales	30%	41%	25%	5%
Production	18%	48%	23%	11%
Employment	7%	64%	30%	0%
Purchases	30%	43%	27%	0%
Prices Paid (Major Purchases)	9%	64%	27%	0%
Lead Times (from Sellers)	18%	55%	27%	0%
Purchased Inventory	9%	50%	25%	16%
Finished Goods Inventory	9%	39%	36%	16%

#### Index 2008 - 2009 (9 months)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
Sales	-34	-40	-28	-13	-30	-22	-22	-5	5
Production	-21	-20	-18	-20	-18	-12	-27	-15	-5
Employment	-39	-38	-48	-43	-33	-32	-29	-27	-23
Purchases	-39	-30	-43	-38	-35	-20	-22	-22	2
Prices Paid (Major Purchases)	-32	-38	-40	-48	-43	-24	-27	-22	-18
Lead Times (from Sellers)	-29	-38	-43	-33	-33	-22	-15	-10	-9
Purchased Inventory	-13	-20	-20	-15	-25	-17	-17	-22	-16
Finished Goods Inventory	-13	-15	-13	-18	-25	-12	-27	-24	-27

Note: Each monthly index was calculated by subtracting the "DOWN" percentage from the "UP" percentage. The indices are not seasonally adjusted.

	Oct08	Nov08	Dec08	Jan09	Feb09	Mar09	Apr09	May09	Jun09	Jul09	Aug09	Sep09
Composite PMI	51.7	49.0	45.4	39.6	39.6	39.0	40.9	41.9	43.5	43.8	46.8	50.0

A reading above 50 indicates that the Houston economy is generally expanding; a reading below 50 indicates that it is generally contracting.

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**Address Service Requested**

## **November 2009 Dinner Menu**

Garden Green Salad  
Chicken Cordon Bleu With Mushroom Sauce  
White Steamed Rice  
Green Beans With Roasted Almonds  
Rolls with Whipped Butter  
Raspberry Swirl Cheesecake  
Iced tea and Coffee  
Vegetarian dinners available upon request.  
Please notify us at the time your reservations are made.  
You must request an alternate meal in advance.

### **NAPM - Houston, Inc. - Policy Statement**

NAPM-Houston, Inc. shall conduct all association functions in a professional manner, and without malice or discrimination, by word or action, with relation to race, religion, national origin, color, sex, age, or disability. Anyone who feels an offense against them has transgressed, or has infringed upon, or violated their protection under this policy, should contact any member of the Board of Directors Executive Committee for resolution under the established rules and regulations adopted by NAPM-Houston, Inc. Board of Directors.