

Webinar on

Implementing Purchasing Policies

Date : July 13, 2021

Areas Covered

- *How to improve and implement changes to current procurement procedures*
- *How to create new Procedures*
- *Ways to communicate changes to affected parties*
- *Soliciting Input to facilitate change*
- *Drafting a new procurement manual*

The importance of updating procedures and soliciting feedback after changes are made



In this webinar will cover those looking to improve or change a current procurement policy or program and also for those starting from scratch.

PRESENTED BY:

Kenneth Jones - has been working in the public and non-profit procurement field for 30 years. He worked for the New York State Office of Taxation and Finance as a Purchasing Assistant from 1985-87 and left there to work for the University at Albany, SUNY where he served as a Purchasing Agent and in 1999 was the Assistant Director supervising and providing training for the Office of Purchasing and Contracts.



Date : July 13, 2021

Time : 01 : 00 PM EST

Duration : 90 Minutes

Price: \$149

Webinar Description

Ensure you have up-to-date information on policies, procedures, and contracts. You will learn about the different elements that make up a standard procurement procedure. The topic will cover those looking to improve or change a current procurement policy or program and also for those starting from scratch. You will learn about technical areas to include in structuring a new or improved procedure or program and then will follow along on a real case study involving creating a procurement manual for a funded program that did not have a customized manual for them to use. You will also learn of issues that come up and how to manage changes and keep procedures current.

For Existing Procurement Offices Review What Is Working and What Isn't Working in Your Current Environment...

- Ask Customers That You Service to Provide Feedback or a Formal Customer Satisfaction Survey
- Meet With Current Stake Holders That Use Your Procurement Documents in Their Workflow



- Meet With Outside Control Agencies or Departments That Impact Workflow
- Based on the Feedback Layout an Implementation Plan That Will Improve Outcomes

For New Purchasing Offices or New Procedures Review the Stake Holders and Their Needs

- Do a Survey of Who Your Customers Are and Then Define Their Needs and Abilities
- Establish Work Flow Based on the Procurement Office's Internal Requirements and Needs of the Customers
- Draft Internal Forms Such as Purchase Requisition, Purchase Order, Change Order, and Vendor Contract
- Initiate Internal Controls Such as Authorized Signatures, Levels of Approval, etc.



- Review the Technologies Available to the Customers and Procurement Staff
- Develop a Procurement Manual for the Purchasing Office

Case Study; Creating a Procurement Manual for a Grant-Funded Program

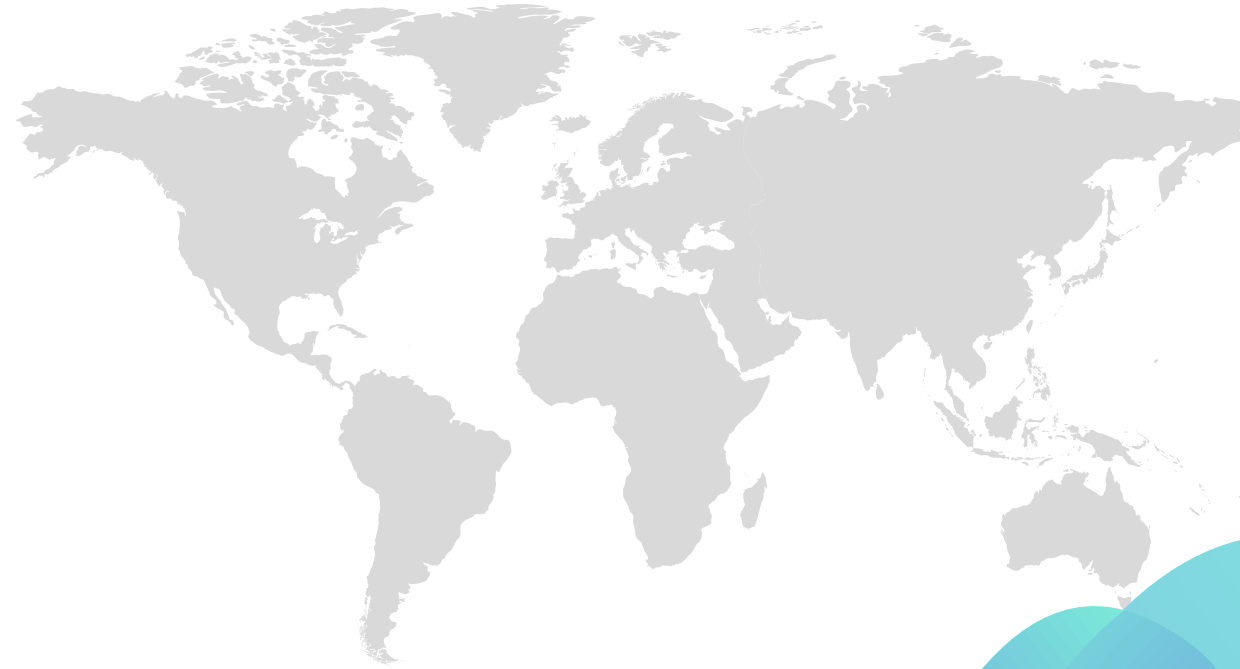
- Which Rules That Will Have Precedence
- Processing Time Limits
- Bidding Levels
- Sample Documents
- Procurement Levels and Approvals
- Single and Sole Source Requirements
- Changing Procedures From Paper-Based to Electronic Work Flow

Avoiding Pitfalls in Procurement Policies



Who Should Attend ?

- *Purchasing Officers*
- *Contract Officers*
- *Accounting Officers*
- *Receiving Staff*
- *Compliance Officers*



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