

Webinar on

How To Write Contracts For Procurement Professionals

Learning Objectives

- How to Draft a Contract*
- Vendor terms to avoid*
- Terms for you to include*
- How to Amend/Renew a Contract*
- How to manage a Contract*



Areas Covered

- Drafting a Contract*
- Scope of Work*
- Payment Terms*
- Term Dates & Renewals*
- Necessary Clauses*
- Contract Administration*



From this webinar, Attendees will learn about the different elements that make up a standard procurement procedure.

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. Ken has presented on various procurement topics both in person and on the Web.

On-Demand Webinar

Duration : 90 Minutes

Price: \$200

Webinar Description

Attendees 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. Attendees 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 procurement manual for a funded program that did not have a customized manual for them to use. Attendees will also learn of issues that come up and how to manage changes and keeping procedures current.

Learn terms that may impact your contract and your employer. Get a head start on what to look out for in a common vendor agreement. Discover what terms to include to strengthen the position of your company or agency. Gain an understanding of what terms may be considered deal breakers vs. a business decision. Receive information on the importance of terms to be used to prevent being held hostage by an underperforming vendor under contract.



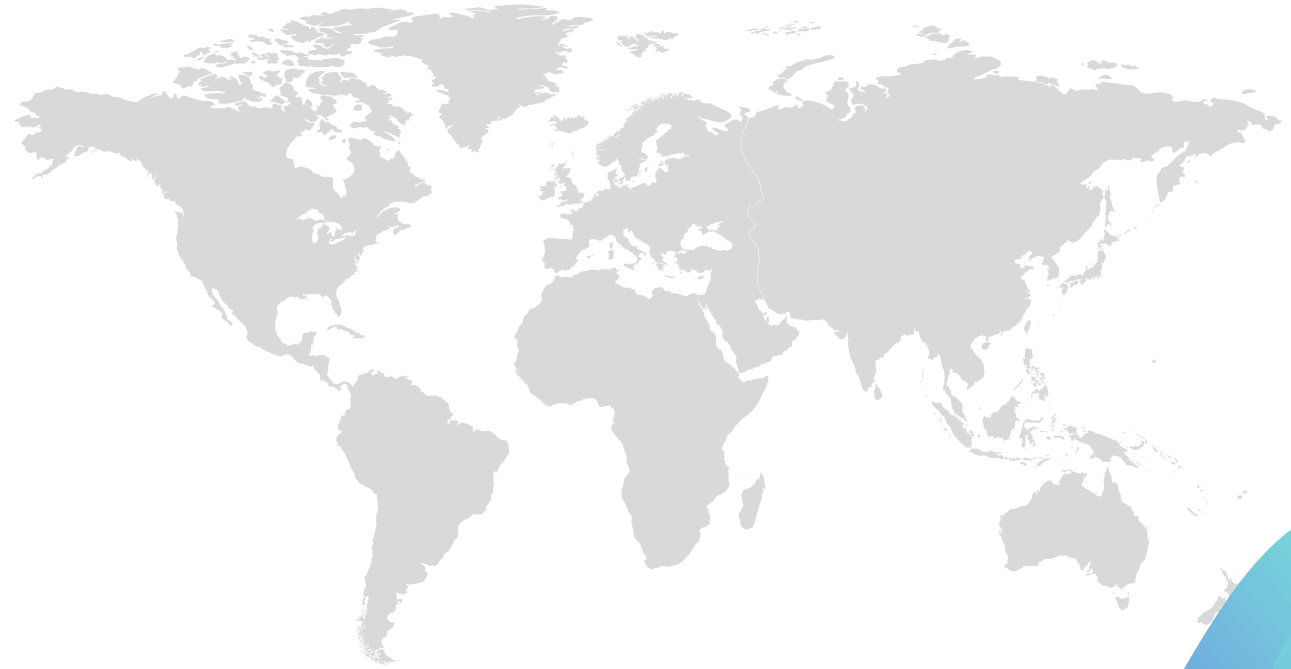
Who Should Attend ?

Purchasing Agents

Buyers

Contract Managers

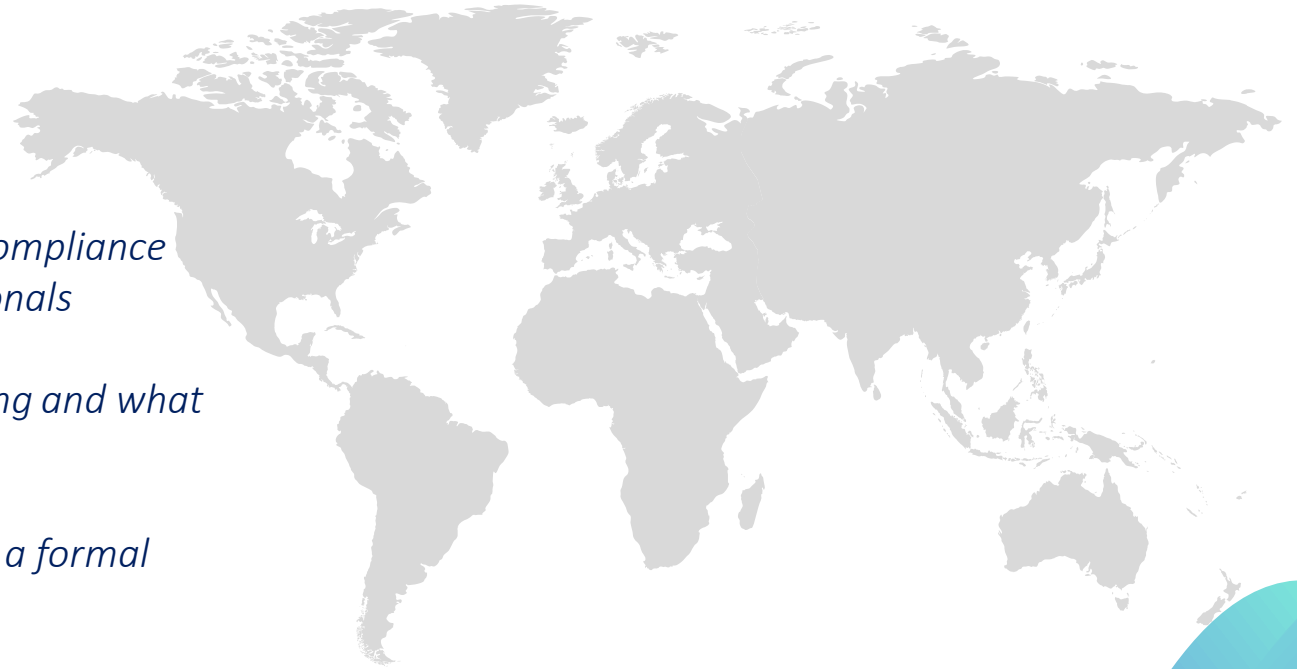
Contract Officers



Topic Background

*Contracts, Procurement, Terms, and Conditions, Vendor Compliance
Implementing Purchasing Policies for Purchasing Professionals*

- I. For existing Procurement Offices review what is working and what isn't working in your current environment*
 - a. Ask customers that your service to provide feedback or a formal customer satisfaction survey.*
 - i. What does our Procurement Office do best?*
 - ii. What does our Procurement Office do worst?*
 - iii. What services are we providing that you find helpful?*
 - iv. What services would you like added to make your job easier?*



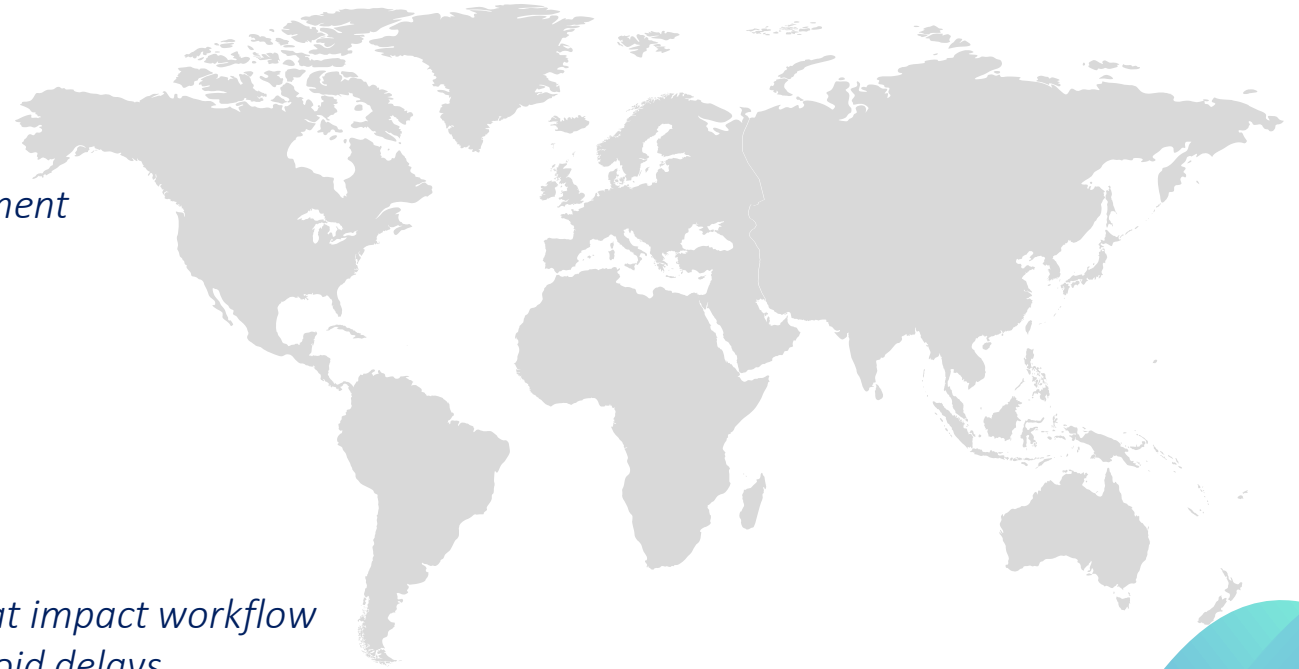
b. Meet with current stakeholders that use your procurement documents in their workflow

- i. Accounting*
- ii. Receiving*
- iii. Equipment or Asset Management*
- iv. Safety or Hazardous Control Offices*
- v. Other internal control staff*

c. Meet with outside control agencies or departments that impact workflow

- i. Discover what is taking up time and how best to avoid delays*
- ii. Provide proper information to avoid questions and additional submittals*

d. Based on the feedback lay out an implementation plan that will improve outcomes



II. *For new Purchasing Offices or new procedures review the stakeholders and their needs*

a. Do a survey of who your customers are and then define their needs and abilities

b. Establish workflow based on the procurement office 's internal requirements and needs of the customers

c. Draft internal forms such as Purchase Requisition, Purchase Order, Change Order and vendor contract.

i. Have documents and forms reviewed by counsel

ii. Capture necessary data/coding on all forms such as charge accounts, commodity codes, descriptions, cost, etc.

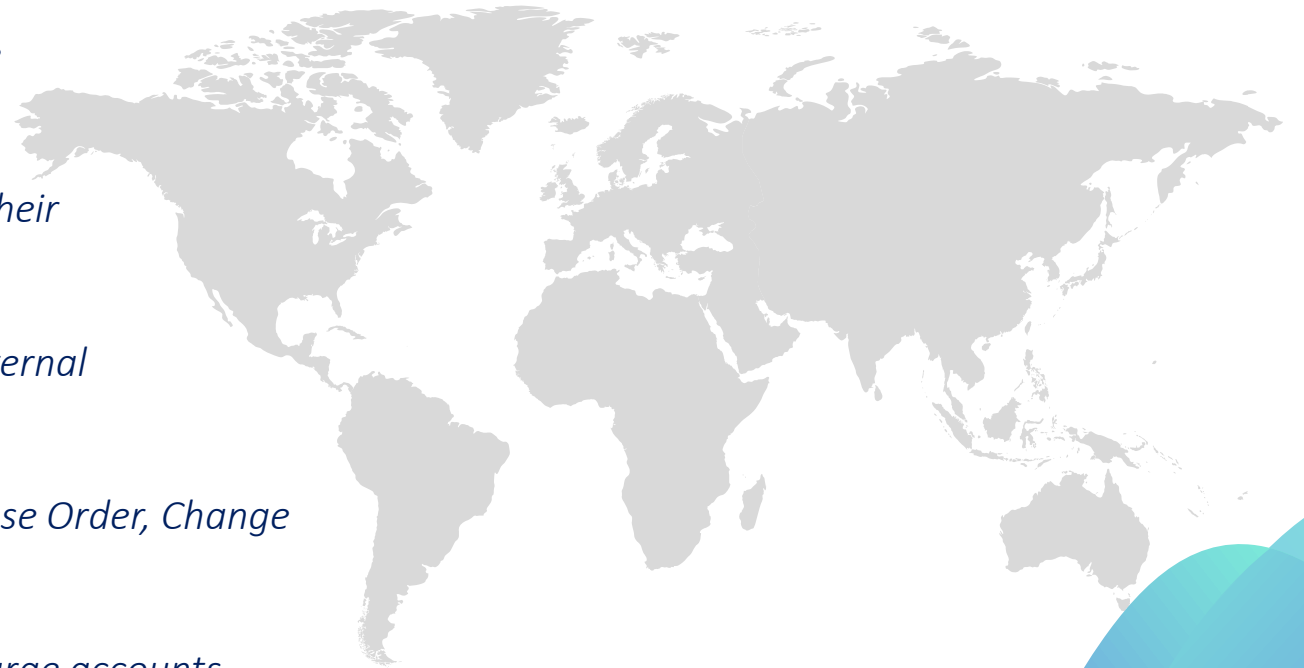
d. Initiate internal controls such as authorized signatures, levels of approval, etc.

i. Internal rules about interactions with vendors

ii. Bidding limits and discretionary spending

iii. Use of travel and procurement cards

iv. Setting spending authorization levels

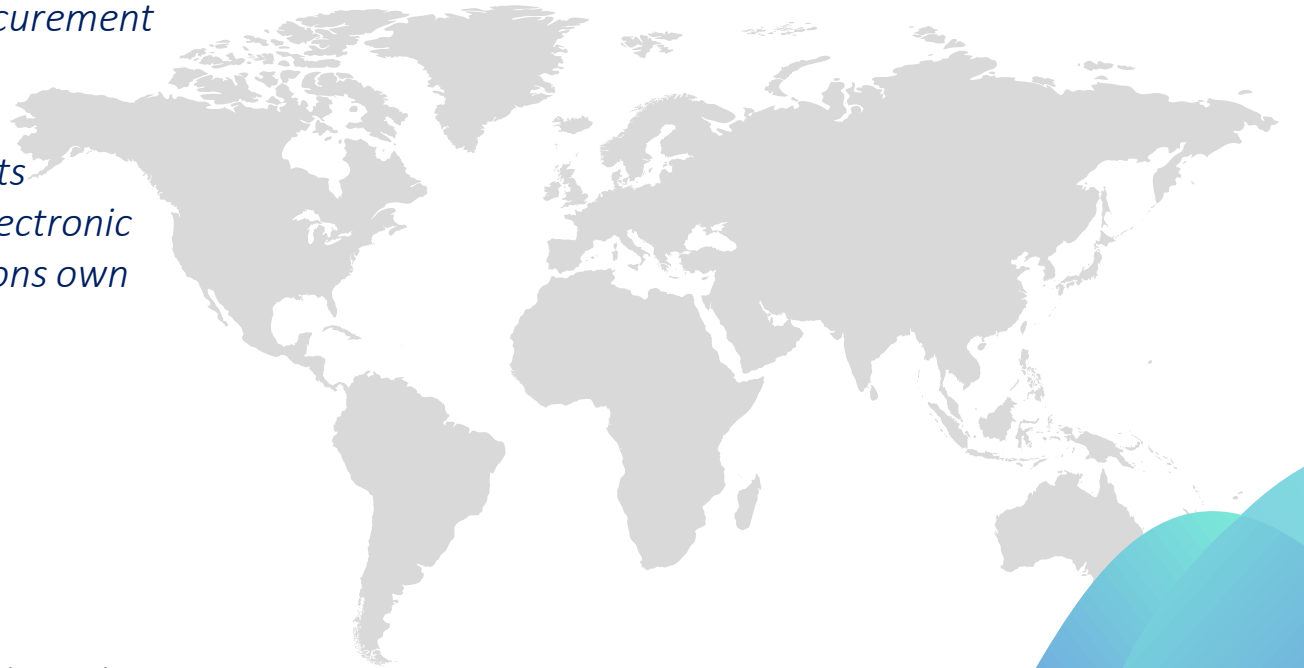


e. Review the technologies available to the customers and procurement staff

- i. If appropriate develop electronic ordering and workflow procedures to speed processing in lieu of paper documents*
- ii. Work with vendors to establish discount schedules and electronic ordering and workflow using their site or your organizations own procurement portal system*

f. Develop a procurement manual for the purchasing office

- i. The manual should include among other things:
 - 1. Definition of all terms being used*
 - 2. Procurement form samples*
 - 3. Instructions in using and filling out the sample forms*
 - 4. Workflow, how does a request start, who is authorized, how does it reach the procurement office required approvals within the organization before the vendor commitment*
 - 5. Bidding levels to determine when a certain number of competitive proposals are required*
 - 6. Contract use and administration**



III. Case Study; Creating a Procurement Manual for a Grant Funded Program

Which rules that will have precedence

Processing time limit

Bidding Levels

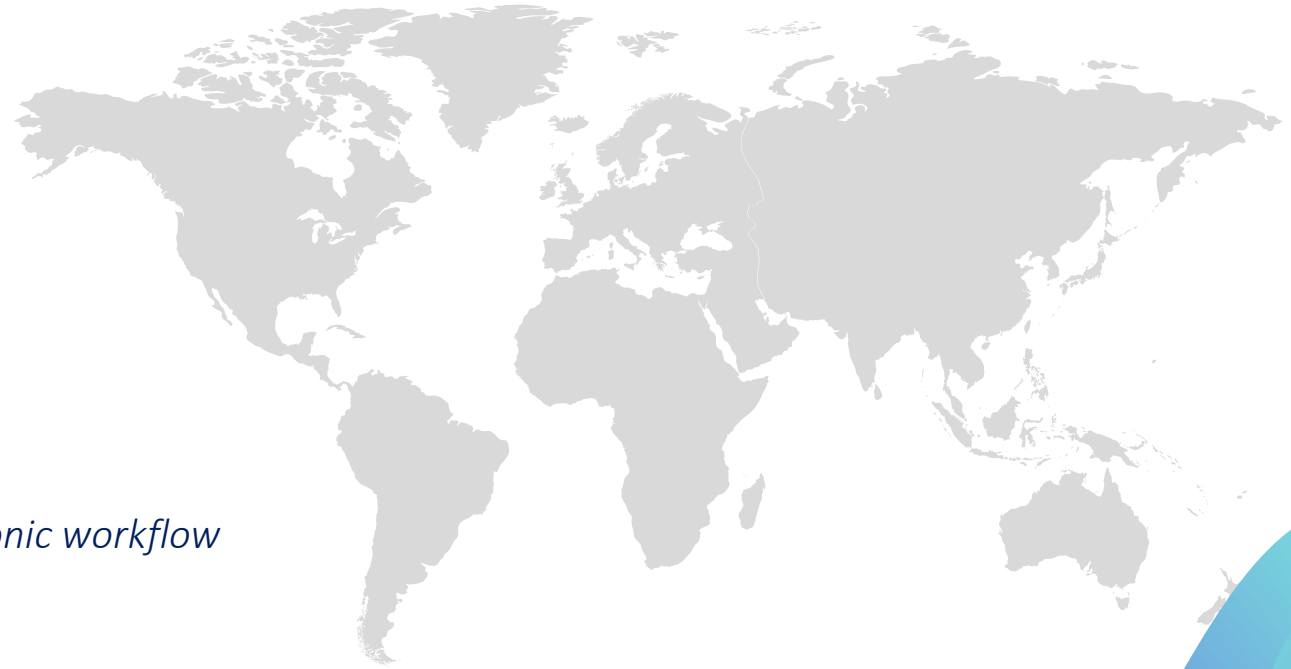
Sample documents

Procurement Levels and Approvals

Single and Sole Source Requirements

Changing procedures from paper-based to electronic workflow

IV. Avoiding Pitfalls in Procurement Policies



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