

## Agenda | Day One | Wednesday, October 11

8:45 - 9:00

Introductions and Welcome

TASBO Staff

9:00 - 10:00

**Federal Procurement Updates and Hot Topics**

Join us as we discuss any updates regarding Federal Procurement and touch on popular conversations that are happening, including the recent TDA Changes. Come ready to discuss best practices and share information as to what your district is doing with the TDA self-certification of the micro-purchase threshold.

**Adam Stearns, RTSBA**  
Director of Purchasing  
Klein ISD

10:10 - 11:10

**Commodity Code Countdown – Ten Topics of Ongoing Implementation and Management**

We already know we have to do it, now what? In this session, we will discuss commodity code related topics from a small/large district perspective. Attendees will be offered tips to help in their day to day purchasing operations.

**Geralyn Moseley, RTSBA**  
Director of Purchasing  
Spring ISD**Brooke E. Lakner, RTSBA**  
Director of Purchasing  
Texas CityISD

11:20 - 12:20

**Pcard/Travel Card/T&E/Fuel Card/Sam's – Best Practices**

This session will provide you with tools and takeaways to manage and support a P card program, including travel cards, fuel cards and actual procurement cards. Included will be best practices, forms and checklists to help navigate a procurement process using credit and/or debit cards.

**Lori Vechione, RTSBA**  
Director of Purchasing  
Keller ISD

BREAK

**Lunchtime**

1:20 - 2:20

**Construction Procurement/Construction 101**

Construction law is unique and different from what we are used to in normal K-12 purchasing processes. There are unique requirements that must be known by the purchasing and construction staff and need to be understood moving forward through a procurement. This session is a starting point in understanding some of these uniquenesses and includes important points to consider to ensure all boxes are checked and the procurement will be a success.

**Jamie Spiegel, RTSBA**  
Senior Director of Business  
Process Improvement  
Leander ISD

2:30 - 3:30

### The Ins and Outs of Vendor Onboarding

*Understanding vendor onboarding in order to develop an efficient, compliant vendor onboarding system to meet the needs of your unique district culture.*

**Chad P. Doucet, RTSBA**

Director of Purchasing  
Jubilee Academic Center

**Jana M. Hunter, RTSBA**

Director of Purchasing  
Rockwall ISD

**Lauren Zotz**

Director of Purchasing  
Wichita Falls ISD

3:40 - 4:40

### Cooperative Purchasing: Answers to the Most Common Questions

*In this fun and interactive session, two attorneys will play out the most common legal questions and quandaries involving cooperative purchasing. The presenters will cover the legal requirements applicable to cooperative purchasing, including with federal funds, and will provide best practice tips for conducting due diligence, including for purchases involving technology and construction services.*

**Micki Morris**

Partner  
Rogers, Morris & Grover, LLP

**Stacy Paltiyevich**

Associate  
Rogers, Morris & Grover, LLP

## Agenda | Day Two | Thursday, October 12

8:55 - 9:00

### Welcome

9:00 - 10:00

### Spectacular Specifications

*This session will explore the principles of developing specifications and scopes of work as well as the required information needed to write these. We will cover potential contract risks, the market forces in play and discuss why vendors commonly no bid.*

**Rick Gay, RTSBA**

Exec. Dir. Business Services  
Fort Bend ISD

BREAK

## Hotel Check Out

10:20 - 11:20

### Updating Your Solicitations

*Whether you are creating a solicitation for child nutrition or construction, it is imperative you ensure your solicitations are up to date. Each solicitation needs to be reviewed and not just recreated to cover any potential charges regarding state law, federal guidelines, and TEA directives. In this session we will discuss affirmations and forms that must be completed, best practices, checklists, and recent changes to requirements for solicitations.*

**Candace Fuchs, RTSBA**

Purchasing Director  
Joshua ISD

11:30 - 12:30

### Building a Website to Support Your Staff With the Procurement Process

*This session will demonstrate how Gregory-Portland ISD's Purchasing Department seeks opportunities to train and guide all staff on how to purchase with school district funds. We cover the (Who, What, When, Why, and How) through formal and informal trainings and a robust website*

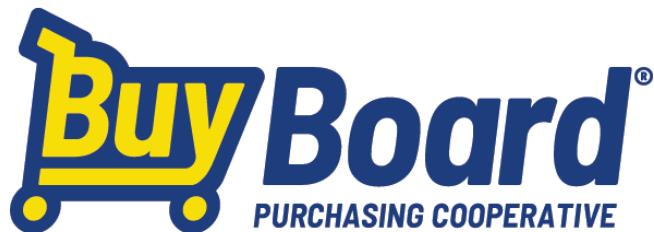
**Christopher Casarez, RTBSA**

Purchasing Coordinator  
Gregory- Portland ISD

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