



2023 Purchasing Fundamentals

Tuesday, October 10 | 8:45 AM to 4:40 PM | Georgetown

Training Agenda

8:45 - 9:00

Introductions and Welcome

TASBO Staff &
Committee Leaders

9:00 - 9:30

Name that Acronym Game

Have some fun and gain an understanding of commonly used acronyms in governmental purchasing.

TASBO Staff

9:30 - 10:00

Account Codes

Learn the story that each account code tells. Learn the structure of account codes and why they are just as important to Purchasing staff as they are to Accounting staff.

Lori A Vechione,
RTSBA
Director of Purchasing
Keller ISD

10:10 - 11:10

Purchasing Methods

Take a peek into the competitive procurement process toolbox located in your District's Purchasing Department. A variety of purchasing methods will be reviewed and discussed along with some key indicators on selecting the appropriate method for your purchase of products and services with guidance from TEC 44.031 and EDGAR.

Chad P. Doucet,
RTSBA
Director of Purchasing
Jubilee Academic Center

11:20 - 12:20

Basics of a Contract

Explore a sample checklist for reviews of contracts that you can use and modify to meet your needs. Review key areas of a contract to check for compliance with Texas laws, including fiscal funding clause, governmental immunity provision, indemnification of vendor, arbitration, and dispute resolution. Discuss how to develop contract approval limits.

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

BREAK

Lunch

1:20 - 2:20

Purchasing Policies & Ethics

Receive helpful tips on where to find the purchasing policy for your district, plus a review of your ethics in the workplace and how it affects your role. Compare some policies for examples of when items require board approval.

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

2:30 - 3:30

From Req to Check

Discover tools to help you navigate the process of moving from a requisition, to a purchase order to delivery and then payment. Leave with an understanding of what it takes to make a legal school district procurement while meeting the needs of an ever-changing educational world.

Lori A Vechione,
RTSBA
Director of Purchasing
Keller ISD

3:40 - 4:40

Working with Coops and Interlocals

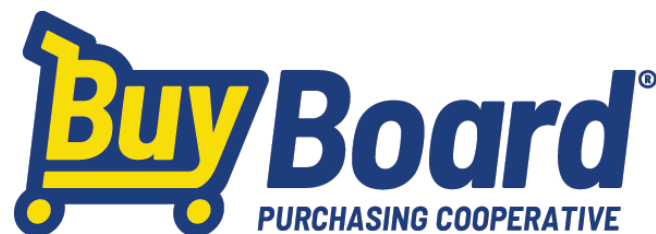
In a busy or staff-limited purchasing office, tools such as cooperatives or interlocal agreements with state or local agencies can make the task easier and quicker and allows for a compliant procurement process to meet your customer's needs. Examine best practices for dealing with these entities.

Chad P. Doucet,
RTSBA
Director of Purchasing
Jubilee Academic Center

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