



## Purchasing/Procurement Certificate Program

**E**stablished in 2018 the AASBO Purchasing/Procurement Certificate Program is a program designed for school district purchasing and procurement personnel but is available to anyone in school business management or K-12 education. The program supports the on-going professional development of school business officials and defines the essential skills and knowledge that every effective school business professional should possess. The program is sponsored by AASBO and the University of Alabama College of Continuing Studies and supported by the Alabama State Department of Education.

### ***Benefits of the Purchasing/Procurement Certificate***

#### ***Purchasing/Procurement Program***

The program consists of 8 courses (30 classroom hours) in school finance management that provide a great deal of information in a short time. The program is designed to provide school district purchasing and procurement personnel with the knowledge and skills necessary to implement sound procurement practices including the decision-making process and a working knowledge of the rules, principles, and procedures for governmental purchasing as it applies to Alabama Local Education Agencies (LEAs). The program will provide information on specific topics, the opportunity for questions and discussion, and networking with other school business officials. The program holds classes three times a year and also provides some courses on-line. Upon completion of the program each graduate is required to continue their training by obtaining 9 hours of CPE credit annually in order to maintain their certificate. All courses have been created and approved by the AASBO Certificate Committee and are tailored to meet the needs of school business officials.

#### ***Program Objectives***

- ◆ To promote the highest professional and ethical standards of school business management practices for Alabama's schools.
- ◆ To provide recognized standards of professional competence for school business officials.
- ◆ To provide professional growth opportunities in order to carry out most effectively the responsibilities of the purchasing and procurement officer.
- ◆ To capitalize on the experience and training of current school business officials to enhance the functions of all school business officials.
- ◆ To develop skills to link fiscal operations to school district goals.
- ◆ To build confidence in school business officials in their ability to effectively manage school finances.
- ◆ To analyze the duties and responsibilities of school business officials and identify minimum skills needed.

- ◆ Provides access to information and training of the purchasing requirements for School Finance Operations for Alabama School Districts.
- ◆ Provides professional development experiences and recognition for the wide variety of assignments, duties and tasks of Purchasing Officers/Directors, CSFO and others with purchasing responsibilities.
- ◆ Provides a basis for advancing professionalism in the area of purchasing and procurement.
- ◆ The program will provide practical overviews of key areas of laws, regulations and practices.
- ◆ The identification of information and resources to enhance skills and knowledge for use and understanding tools and techniques in support of purchasing activities.
- ◆ Provides networking opportunities.
- ◆ Quality continuing professional educational programs.
- ◆ Strengthens the management of local school system's operations for the ultimate benefit of the students of Alabama Public Schools.

# CERTIFICATE COURSES

## **School Business Operations I & II**

It is important that the school business official understands school business operations. This two-part session will provide an overview in key areas of school business, finance and management including a foundation of laws, policies and regulations that affect the day-to-day operations of a school business office.

## **Effective Business Communications**

Effective Communication is an essential component of organizational success whether it is at the departmental or organizational level. Being able to communicate effectively and in a professional manner is a necessary and vital part for every school business official. This course is designed to improve your communication as it addresses basic communication skills, effective oral communication, public speaking, utilization of email and technology as a communication tool and more. Learn techniques and strategies to send clear messages, create credibility and develop strategic communications.

## **Purchasing and Procurement Overview**

When procuring and contracting for goods and services, school districts must follow various state laws and federal regulations that govern procurement, contracting, and bidding in the public sector. In addition to state laws, many local education agencies have policies that introduce another layer of rules on the procurement and contracting process. While state laws and local rules dictate many elements of this process, local boards of education still have discretion on some of the issues concerning contracting. School budgets are tight and time is limited, which makes well-formed purchasing decisions essential for school business officials. This session will cover the legal aspects and basics of performing the purchasing and procurement functions and general accepted practices and procedures in the purchasing process.

## **Ethics and Vendor Supply Relationships and Management**

Public purchasing and the expenditure of public funds require that ethical standards be incorporated into every aspect of the school district's purchasing function. Purchasing directors, CSFOs, and other business office personnel face the difficult task of developing good vendor relations and encouraging vendor competition while avoiding even the appearance of favoritism or other ethical misconduct. In an effort to get the job done successfully and on time, one may be tempted to circumvent policies, procedures, and laws, or make their own liberal "legal" interpretations of existing policies. Such activity, although well intentioned, will cause ethical problems. A good vendor/contractor relationship contains integrity, trust, honesty, openness, fairness, and reliability on the parts of both parties. Relationships containing these elements can bring about many benefits for school district.

This course will focus on vendor/contractor relationships and the code of ethics for the school district combining educational and business ethics. Topics will include a definition of business ethics, sources of ethical values, organizational and/or community ethical standards, Alabama Ethics Law, ethical guidelines for decision makings, and how to cope with unethical situations.

## **RFP/Contract Development and Management I & II**

The two-part session will focus on processing and bids and contracts. The session will cover various legal issues that affect purchasing including bid, performance and payment bonds, contractor insurance coverage to mitigate risk, school safety requirements for contractors. Learn about the competitive bid process including determining the solicitation method need, writing the solicitation document, advertising or contacting vendors to request quotes, bids, or proposals, evaluating the quotes, bids, proposals and awarding/negotiating the contract.

## **Financial Management Strategies and Data Driven Decision Making**

Financial management is essential for all areas of school business including those with or without an accounting background. Now more than ever, school business officials must synchronize the actions of business units and the goals of the school district so that the educational resources are expended in the most efficient manner possible, especially in the classroom. This session will address financial management techniques for developing long range plans and making management decisions based on school district data, plans and goals.

## **Public Works Contracts**

Topics in this session will include the changes to the Alabama Competitive Bid Law as it relates to the Public Work Law, and Public Works Law regulations and procedures.

## **Elective**

Topics will include best practices and/or updates relative to purchasing/procurement.