



AGENDA
Purchasing Advanced
September 26, October 11, and November 1
Webinar
8:00 – 10:00 am

Learn the fundamentals of various legal issues that affect purchasing including Bid, Performance and Payment Bonds; contractor insurance coverage to mitigate risk; School Safety Requirements for contractors; ethics, Federal contract requirements, Freedom of Information (FOIA) requests; and records retention.

September 26 - 8:00 – 10:00 am – Live

- 8:00 – 8:10 am **Set the Stage** – Presenter(s): Debbie Kopkau, MSBO
- 8:10 – 9:00 am **Legal Background** – bid bonds, insurance, school safety legislation, construction requirements (architects, permits), federal contract requirements, pre-bid and post-bid legal issues will be addressed. Presenter(s): Jeremy Motz, Clark Hill, PLC
- 9:00 – 9:45 am **Request for Proposal (RFP)** – RFP Building. Presenter(s): Jesse Sutton, Southfield Public Schools
- 9:45 – 10:00 am **Homework and next meeting** – Steps of the RFP Process exercise – work with your business manager or another purchasing manager in your district. Presenter(s): Elizabeth Junek, Oakland Schools

October 11 - 8:00 – 10:00 am – Live

- 8:00 – 9:00 am **Insurance and Risk Management.** Presenter(s): Cindy Reed and Janet Sluiter, SET SEG
- 9:00 – 9:30 am **Pre-Award Issues:** building RFPs, evaluating bids, percentage off bids, using consultants (one time, regular and owner's rep), snow days, pre-bid mtgs, project work schedule, BAFO, buying items/installing later. Presenter(s): Jesse Sutton, Southfield Public Schools
- 9:30 – 9:55 am **Post-Award Issues:** rushed purchases (options and pitfalls), cooperative bids (examples: beverages), vendor protests, unit pricing/extend pricing, getting insurance confirmations. Presenter(s): Elizabeth Junek, Oakland Schools
- 9:55 – 10:00 am **Homework and next meeting – True or False**

November 1 - 8:00 – 10:00 am – Live

- 8:00 – 8:15 am **Review homework for days 1 and 2.** Presenter(s): Elizabeth Junek, Oakland Schools and Jesse Sutton, Southfield Public Schools
- 8:15 – 9:00 am **Evaluate Bids.** Presenter(s): Elizabeth Junek, Oakland Schools and Jesse Sutton, Southfield Public Schools
- 9:00 – 9:45 am **Ethics in Purchasing and Dilemmas.** Presenter(s): Eric Formberg, Plante Moran
- 9:45 – 10:00 am **Questions and Wrap-up.** Presenter(s): All presenters