

# CPO

## Purchasing Officer

Established in 1998, the Michigan School Business Officials (MSBO) Voluntary Certification Program supports the ongoing professional development of school business officials. The program is a mark of distinction that reflects professional achievement and demonstrates a person's dedication to the profession.

### Benefits of Purchasing Officer Certification

The Purchasing Officer (CPO) certification:

1. Provides access to information and training that is specific to Michigan laws and regulations; and
2. Provides a basis for advancing professionalism of Purchasing Officers in Michigan schools.

### The CPO Program

MSBO certification courses provide a great deal of information in a short time. Most courses are "bulleted" information rather than in-depth training. They are intended to cover major points about their respective topics, offer an opportunity for questions and discussion, and provide resource information for future use.

The recommended beginning course for Purchasing Officer certification is Purchasing Overview. Although anyone may benefit from this or other individual certification courses, the full program is generally intended for Purchasing Managers, Supervisors, practitioners or assistants who have responsibility in purchasing and are in their first 1-5 years of employment. For those who have more than 5 years of experience in purchasing, MSBO will evaluate his/her experience to determine how much additional training is required prior to granting certification. A grandparenting application is required.

Any person employed in school business operations who meets the stated requirements may receive Purchasing Officer certification. There is no requirement for holding a particular position in a school district. Purchasing Officers are typically employed within the business office and have responsibility in purchasing.

### Requirements

This program and the courses listed have been created and reviewed by the Professional Development Committee of MSBO. An applicant for certification must be a member of MSBO and hold an Associate's Degree.

Read the reverse side of this sheet for brief descriptions of certification courses that are offered through MSBO. In some circumstances, courses from other sources may be counted toward MSBO certification. *Please be aware that some courses and/or requirements may change. MSBO and the committees that created this program continue to evaluate and modify as deemed appropriate.*



## MSBO Voluntary Certification Program

### MSBO's Certification Program Benefits:

- Provides access to information needed to succeed in your job
- Offers practical overviews of key areas of law, regulations and practices
- Identifies resources for in-depth and additional information that may be utilized at a later time
- Assures a quality curriculum is developed and monitored by the MSBO Professional Development Committee
- Uses experienced practitioners to teach classes
- Offers seminars at regular intervals and reasonable prices
- Uses adult learning principles and provides a learning environment where colleagues can share experiences and information

Go to [www.msbo.org](http://www.msbo.org) for more information about the MSBO Voluntary Certification Program for School Business Officials.

### Questions?

Contact Courtney Byam at 517.327.5937 or by e-mail at [cbyam@msbo.org](mailto:cbyam@msbo.org); or

Debbie Kopkau at 517.327.2587 or by e-mail at [dkopkau@msbo.org](mailto:dkopkau@msbo.org).

# Purchasing Officer (CPO) Course Descriptions

## *Developing and Managing RFPs*

**(6 hours):** An in depth review of the Request for Proposals (RFP) process including the development of the RFP through the evaluation of proposals and the award of the contract. Subjects covered include when to use a Request for Proposal versus an Invitation for Bid (IFB), writing specifications, managing the process, selection of an evaluation team, roles and responsibilities of the teams, evaluating and rating the proposals and pricing, conducting interviews/ demonstrations, negotiating with bidders, finalizing the subsequent agreement and administering the contract.

## *Effective Communications (3 hours):*

Learn techniques and strategies to send clear messages, create credibility, and develop strategic communications programs that are effective for your school district.

## *How to Process and Evaluate Bids (3 hours):*

Learn how sealed bids should be written and processed in order to minimize mistakes or bidder protests. Learn to write bid specifications, bid do's and don'ts, and to define a responsive and responsible bidder.

## *Introduction to School Business:*

**(14 hours):** An overview of school business operations with a focus on several key areas. The program will begin with a brief background on the general functions of the school Business Office Manager. Major components of the program will include: listing and describing reports that must be filed with federal, state, and local agencies; reviewing school laws and the Revised School Code; introducing fund accounting processes; reviewing school organizational

issues and operational issues (how school boards and administrators function); and exploring inter-relationships between the business office and site operations – offices in school buildings, facilities, transportation, and food services. Part of the program would be devoted to discussion about the roles and functions of the school business official.

## *Principles of Contract Writing (3 hours):*

Learn tips and techniques to write and interpret contracts more effectively. This session will define what a contract is, the components and structure of a contract and will cover various provisions that should be included.

## *Principles of Education (3 hours):*

Understand the educational process, culture of schools, major learning theories, teaching methodologies, school improvement, design of in-service programs, and the structure and function of the principalship.

## *Purchasing Overview (3 hours):*

Basics of performing the purchasing function, including: related Michigan laws, contract basics, purchased services, the structure of a purchasing operation, electronic and cooperative purchasing, cost savings opportunities, various solicitation types (IFB/RFP) and the respective procedures and requirements when spending Federal funds.

## *Purchasing Advanced (6 hours):*

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.

**Team Leadership (3 hours):** Learn how to match your leadership style with the culture of the organization. Matching leadership style to the cultural landscape will allow you to increase your productivity, decrease communication problems and strengthen your conflict management skills.

## *Wrap-up/Ethics (2 hours):*

Celebrate completion of your certification program! Reflect on what you have learned and your role in the educational process and your school district. This class can be taken only if you are two classes or less from completing your certification (not counting the Wrap-Up/Ethics Session).

**Elective (6 hours):** Any course taken outside of this certification track but required in another.

**Total class time is 52 hours.**

**Required continuing education includes 90 hours within a five-calendar-year period.**

**These hours can be earned through MSBO.**

*Other recommendations for continuing education credits are courses offered through:*

- National Institute of Governmental Purchasing (NIGP) at [www.nigp.org](http://www.nigp.org)
- Michigan Public Purchasing Officers Association (MPPOA) at [www.mppoa.net](http://www.mppoa.net)
- State of Michigan's free purchasing courses by emailing [DMB-PurchKnowledge@michigan.gov](mailto:DMB-PurchKnowledge@michigan.gov).