

**OFFICE OF PURCHASING
STAFF VISITATION REPORT**

TODAY'S DATE: _____
STAFF MEMBER(S) IN ATTENDANCE _____

DEPARTMENT VISITED: _____
INDIVIDUAL(S) VISITED: _____

DATE OF VISIT: _____ LENGTH OF VISIT: _____

NOTE: THIS REPORT IS DUE WITHIN FIVE CALENDAR DAYS OF VISIT

Check Only Those Accomplished:

_____ **I. PURPOSE OF THE VISIT:**
Ascertain department's needs and concerns. Discern department's role at the County. Provide the department with information regarding Purchasing and Contracts. Other: _____

_____ **II. DEPARTMENT TOUR?** _____ YES _____ NO

_____ **III. QUESTIONS ASKED:**

What is the job of the individual(s) in the user department?

How does he/she interface with the procurement process?

Other(s) _____

IV. MATTER REVIEWED:

- _____ A. How to develop specifications or scopes of work?
- _____ B. Explain the importance of Email and Voice Mail.
- _____ C. Explain the flow of a Purchase Requisition before it reached Purchase Order status.
- _____ D. Ask what areas are especially troublesome and provide advice
- _____ E. Review sole source, emergency procedures and dollar limitations.
- _____ F. Explain what items or data is available on:
 - _____ 1. County term contracts
 - _____ 2. State contract
 - _____ 3. GSA contract
- _____ G. Discuss your personal goals to improve service for the department(s).
- _____ H. Answer questions
- _____ I. Explain when to call the Office of Purchasing and when to call Accounts Payable.
- _____ J. Contract Administration guidance
- _____ K. Contract Administration audit of Department files.
- _____ L. Discuss/resolve vendor problems
- _____ M. Other _____

V. MATERIALS PROVIDED TO THE INDIVIDUAL(S) BEING VISITED:

- _____ A. Organizational Chart/Buyer Departmental/P.A. Commodity Assignments
- _____ B. Office of Purchasing "Policies and Procedures Manual" (or sections _____).
- _____ C. State contracts applicable to the department being visited.
- _____ D. Directory of Minority Firms
- _____ E. Other _____

VI. WRAP-UP

A. QUESTIONS ASKED

- 1. In which areas of purchasing would you like to see changes? _____

- 2. Do you have specific concerns that we have not addressed today?

- 3. Is there anyone else in your department with whom purchasing should meet?

- 4. _____

- 5. _____

- _____ B. Emphasize our dedication to the development and maintenance of good relations with the department(s).
- _____ C. Thank the individual for his/her time. Urge that person to contact you when they need help. Leave business card.
- _____ D. Follow-up with a brief note thanking the individual(s) for their time and providing information regarding specific areas of their concern. Attach a copy of that note to this report.
- _____ E. _____

- _____ F. _____

VII. VISITATION REPORT REVIEWED BY:

Purchasing Manager _____ Date _____
Purchasing Supervisor _____ Date _____

cc: Assistant County Administrator