



- I. Purpose For the Office Purchasing to make staff visitations to Client Departments and Offices.
- II. Scope These guidelines apply to all Office of Purchasing staff visitations to client Departments and Offices in which purchasing matters/activities are discussed, explained, and guidance is offered to improve the purchasing processes and functions of those Departments and Offices.

III. Responsibility

- A. The Office of Purchasing Staff Members are responsible to arrange and plan Office of Purchasing Staff visitations to Client Departments and Offices when needs for such visits are determined. These visits may be initiated by the Office of Purchasing or upon request of the Client Departments or Offices.
- B. These meetings are to be held at the client Department or Office location, and they are attended by the appropriate staff of the Office of Purchasing and the Client Department or Office.

The Purchasing Staff Members who arranged the meeting and/or attended the meeting shall complete Form OF0215 "Office of Purchasing Staff Visitation Report" within five calendar days of the visit.

All information applicable to the visitation shall be noted on Form OF0215 "Office of Purchasing Staff Visitation Report" and submitted to their immediate supervisor. (i.e. Office Assistant to Purchasing Agent, Purchasing Agent to Supervisor, Supervisor to Purchasing Manager) for review and sign-off. Subsequently a copy will be forwarded to the appropriate Assistant County Administrator.

- C. The visiting Purchasing personnel shall assure that the key personnel contact at the Department or Office is left with an "Evaluation of Office of Purchasing Staff Visit" Form OF0225 with a request that the Department/Office fill it out and return it to the Office of Purchasing. This survey form will capture the client Department/Office feedback or the meeting. This feedback will give an indication of the effectiveness of the visit and indicate areas that may need additional follow-up visits.

When returned from the Department/Office the completed and reviewed "Office of Purchasing Staff Visitation Report" Form OF0215 will be filed in the Central Department/Office file, kept in the office of the Office Assistant, with the matching completed and reviewed "Evaluation of Office of Purchasing Staff Visit" Form OF0225. This will identify any additional corrective action needed for future visits and any following future visits should be planned as promptly as possible to assure closure to whatever needs still exist.