

Tips for Developing a Procurement Manual

+ **Keep It Simple**

- Write for the reader (department buyers, customers & managers).
- Use language consistent with PAM and CalPCA and department terminology
- Use short, simple sentences
- Use familiar, strong and short words.
- Provide sample forms and instructions
- Create flowcharts, checklists and quick reference sheets as applicable

+ **Put Policies & Procedures in a Package**

- Pay attention to the following when developing the procurement manual:
 - ✓ Department standards for formats and style
 - ✓ Page design
 - ✓ Table of Contents
 - ✓ Sections
 - ✓ Numbering
 - ✓ Page
 - ✓ Flow charts
 - ✓ Organization charts
 - ✓ Reference documents
 - ✓ Index

+ **Outline the Job – know your department’s purchasing authority program.**

- Review department’s current purchasing authority for
 - ✓ Type (non-IT and/or IT)
 - ✓ Category per type (
 - ✓ Sub-category (i.e. LPA = CMAS, MSA, MRA, etc.)
 - ✓ Dollar threshold per
- Review PAM, Chapter 1, Chapter 13 and Chapter 14 for minimum requirements.
- Cover the “Must Knows”
 - ✓ Refer to the knowledge and understanding you need to perform your job as it relates to your department’s purchasing authority activities.
- Cover the “Must Dos”
 - ✓ Refers to the basic skills required by your job in order to conduct a purchasing activity based upon the type, category of purchasing authority you are conducting.
 - ✓ Define each requirement Review PAM, Chapter 1 for policy requirements and department existing policies to insure that the procurement manual provides for a minimum of the following policies:

+ **Create a roadmap –**

- Lay out your written procedures for each purchasing authority type, category, and sub-category with detailed step-by-step instructions for executing or controlling the important parts of your purchasing activity through each process.
- Each step must be written in a clear and logical sequence.
- All steps should lead to a final goal – receiving the product and/or service in accordance with all rules and regulations for state purchasing and receiving requirements.
- Avoids making the wrong turns that could put you on the road to mix-ups and errors.

+ **Maintenance –**

- Policy and procedures should be reviewed on a regular basis.
- Establish a review and update procedure.

+ **Summary**

A written procurement manual is essential to the consistent functioning of your department’s purchasing authority. When you write them, make sure that they are clear, concise, easy to understand and logical. Having a well conceived, well written and well packaged procurement manual that represents your department’s purchasing authority program is the first step toward purchasing authority compliance, consistent performance and when a department requests increased purchasing authority