



PURCHASING IN A NUTSHELL

LEARN THE OVERALL PURCHASING PROCESS FROM CRADLE TO GRAVE

Training Date: Thursday, April 9, 2020

Training Location: East Texas Council of Governments
3800 Stone Road
Kilgore, Texas

Presenter: Carol Cooper, C.P.M., CPPO

<u>Training Agenda</u>	
8:30 – 9:00	Registration and Opening Remarks
9:00 – 12:00	Purchasing in a Nutshell
12:00 – 1:00	Lunch (provided)
1:00 – 2:00	Do's and Don'ts of Bidding and Purchasing
2:00 – 3:00	86th Legislative Update
3:00 – 4:00	Real Purchasing Quandaries

About Trainer Carol Cooper:

Carol has been providing consulting and training on procurement and professional development topics at conferences, workshops and governmental work-sites since 1996. Prior to retirement from the City of Garland, Texas in 2011, Carol was the Director of Materials Management (purchasing and warehouse). She was actively employed in the purchasing and supply profession since 1978. She has both public and private sector experience in a variety of sectors. Carol has served as President for ISMDallas, Chair for ISM Southwest Forum and a trustee for BuyBoard, a governmental cooperative. She is a Charter member of the Texas Public Purchasing Association and served on the TxPPA Board of Directors. She maintains her membership in both the National Procurement Institute (NPI) and NIGP, The Institute for Public Procurement and participates with the local associations of both. She is also a founding Board member of Garland Area MakerSpace. She was honored with a lifetime membership for both NPI and ISM. Carol is a graduate of the University of Texas at Dallas and holds a lifetime C.P.M. and CPPO.

**Registration
Form
PURCHASING IN
A NUTSHELL
April 09, 2020**

Organization/Entity Information

Name of Organization/Entity		
Street		
City	State	Zip Code

Attendee Contact Details

First name	Last Name	Certification (CPPO, CPPB etc.)
Position Title with organization		
Telephone	Fax	
Email		

<u>Registration Fees</u> \$100.00 member's \$125.00 non-members	
Amount Paid:	PO#
Check #	Date:

PLEASE REMIT FORM AND CHECK

Registration Fees: \$100.00 member's \$125.00 non-members

Remit payment to:
PPAET
200 East Ferguson, St. 414
Tyler, Texas 75702

**Request for Taxpayer
 Identification Number and Certification**

Give Form to the
 requester. Do not
 send to the IRS.

Print or type See Specific Instructions on page 2.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Public Purchasing Association of East Texas		
	2 Business name/disregarded entity name, if different from above		
	3 Check appropriate box for federal tax classification; check only one of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner. <input checked="" type="checkbox"/> Other (see instructions) ▶ 501C3		4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
	5 Address (number, street, and apt. or suite no.) PO Box 9946		Requester's name and address (optional)
	6 City, state, and ZIP code Tyler, TX 75711		
	7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Social security number									
				-					
or									
Employer identification number									
8	1	-	3	4	8	2	0	6	3

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here	Signature of U.S. person ▶ <i>Jennifer Nicholson</i>	Date ▶ <i>4/9/17</i>
------------------	--	----------------------

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/fw9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 2.

By signing the filled-out form, you:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued).
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
- Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.