

Purchasing and Procurement Training Project

*Overview and Update
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Project Purpose and Vision

- The purpose of the **Procurement Training Project** is to develop and implement the curriculum, policy, registration and reporting mechanisms; and necessary supporting technology; if any, to meet the legislative mandates as described in RCWs 39.26.110.
- The project is broken out into smaller projects: Initial Training Phase, Training Program Development Phase, Foundation Phase, and to be determined Future Phase(s).
- The vision of the current Foundation Phase is to meet the legislative mandate by enabling state agency employees who are responsible for ***developing, executing, or managing procurements or contracts, or both***, to complete Department approved training by July 1, 2015.



Legislation – RCW 39.26.110

RCW 39.26.110, Training, states:

- The department must provide expertise and training on best practices for state procurement.
- The department must establish either training or certification programs, or both, to ensure consistency in procurement practices for employees authorized to perform procurement functions under the provisions of this chapter. When establishing training or certification programs, the department may approve existing training or certification programs at state agencies. When establishing programs or approving existing programs, the department shall work with agencies with existing training programs to ensure coordination and minimize additional costs associated with training requirements.
- Beginning July 1, 2013, state agencies must require agency employees responsible for developing, executing, or managing procurements or contracts, or both, to complete department-approved training or certification programs, or both. Beginning July 1, 2015, no agency employee may execute or manage contracts unless the employee has met the training or certification requirements or both as set by the department. Any request for exception to this requirement must be submitted to the director for approval before the employee or group of employees executes or manages contracts.



Project Timeline



Legend: Complete; On Schedule; At Risk; Behind Schedule



Project Organization Structure

Lynne McGuire
Executive Sponsor

Farrell Presnell
Project Sponsor

Lori McCleary
Procurement Reform

Keith Kawamura
Project Manager

Melanie Buechel
Subject Matter Expert & Trainer

DES Learning Management System
Training Host

Public Knowledge
Training & Curriculum Consultants

DES Communications

Training Advisory Group
Procurement SMEs – State Agencies & Higher Ed



Project Phases at a Glance

2012-2013

- 1 - Preliminary Planning

06/2013 –
07/2014

- 2- Initial Training Phase (Meet Immediate Need)

11/2014 –
6/2014

- 3- Training Program Development Phase

06/2014 –
07/2015

- 4- Foundation Phase

Post 07/2015

- 5- Future Phase(s) – Expansion on Core Training



Preliminary Planning

Procurement Reform Workgroup

One of 18 Different Work Groups Established to Address Procurement Reform Legislation

Group formed May 2012

Recommendations Submitted by Group September 2012

TAG Formation

Representatives from over 20 Washington agencies

March 2013

RFP for Training Development Vendor

Two RFPs released
August 2013
October 2013

Public Knowledge Engaged November 2013



Initial Training

Sole Source / Emergency Contracts / Direct Buy

Class designed for personnel who develop, manage, execute and/or file Sole Source, Emergency or conduct Direct Buy

Agency Contract Reporting

Contract Reporting Training for the initial pilot group and two opt-in phases.

Procurement 101

Interim training covering overview of procurement requirements under chapter 39.26 RCW – Procurement of Goods and Services



Training Program Development Phase

Project Vision

Washington's Procurement Training and Certification Program ensures that state procurement professionals, contract managers and executive management have the knowledge, skills and abilities to procure goods and services to support the business of state government.

The Program will:

- Be adequately funded
- Communicate training and certification requirements for specific jobs
- Emphasize critical thinking skills and innovation
- Provide cost-effective and accessible training
- Provide creative and innovative courses
- Address adult learning styles
- Provide course materials that are easy to access and update
- Implement clear and transparent evaluation and testing processes
- Be sustainable and maintained over time
- Enable agencies to receive appropriate delegation of authority



Training Development Phase

Needs Assessment Results

Information Gathering

- **Interviews** with DES staff and stakeholders
- **Visioning sessions** with TAG
- **Focus groups** with representatives of various Washington state agencies
- **Survey** of procurement professionals statewide with over 200 responses
- **Requirements** gathering for courses and certification
- **Gap Analysis:** inventory of current training curricula and materials available through DES and other Washington agencies

Results

- 75% of survey respondents indicated that purchasing or procurement (or both) accounts for over half their job responsibilities
- Training topics rated with high priority include:
 - Complex and Risky Procurements
 - Basic Procurement Overview
 - Contract Management
 - IT Procurements
 - Scope & Requirements Definition



Training Program Development Phase

Deliverables

Parameters

Learning Objectives

Scope of Training

Template/Format

DES Standard
Look & Feel

Course Content & Materials

Presentation (PPT)

Workbook

Instructor
Orientation Guide

Test

Evaluation

Course Evaluation
Form

Lessons Learned
Session



Foundation Phase

Course Content Development

Phase 1 May – July
2014

Phase 2 July – Dec
2014

Learning Management System

Registration

Employee Training
Profile Information

Testing

Reporting

Course Roll Out

Phase 1

Phase 2



Foundation Courses

Purchasing and Procurement 101

General purchasing and procurement information

Roles and responsibilities for purchasing and procurement

Procurement options and processes

Purchasing processes

Resources for purchasing and procurements

Agency roles and responsibilities and strategic alignment

Statements of Work

Components of contracts

Contract Management 101

Purchasing & Procurement 101 – lite

Risk Assessment and Management

Approaches to contract monitoring

Understanding contract terms and conditions

Corrective Action

Communication with Contractors

Employee vs. Contractor

Principals of Public Contracting

Other Foundation Courses

Small Acquisitions

Rules, Regulations and Best Practices

Executive Management Purchasing & Procurement 101

Procurement Ethics

WEBS

Agency Contract Reporting

Client Service Contracts

Anticipated Future Offerings

IT Procurement Academy

Negotiations

Competitive Procurement and Best Practices

How to Develop Requirements

Developing Statements of Work

Evaluation Processes and Methodologies

How to Write a Solid Procurement Document

Small and Diverse Business Outreach Methods

Contract Termination

Use of Master Contracts

Performance Based Contracting

More TBD by DES and TAG



Required Attendees

Broken Down by Typical Work/Tasks

Procurement Professionals

Purchasing/Procurement Coordination

Supply Chain Management

Advises on procurement law/policy/procedures

Develops procurement documents and contracts

Develops specifications

Vendor cures and terminations

Negotiations

Manages procurement risks

Filing and Reporting

Partners with and advises contract managers

Contract Managers

Initiate procurement need

Develops deliverables and specifications

Ensures budget resources

Partner with Contract office to ensure compliance

Negotiations

Manage risk and Monitor contracts

Communicate with Contractor

Provide technical assistance to Contractors

Executive Management

Ensures Agency compliance with procurement laws/policies and procedures

Authorizes procurement

Requests additional delegated authority and exemptions

Executes contracts or delegates authority

Sometimes manage contracts or participates in procurement activities

Small Purchasers

Conducts small procurement from Master Contacts

P-Card purchases w/in limits of authority

Conducts low risk direct buys

Supplies inventory and stockrooms – office



Staff to Course Matrix

Procurement Professional	Contract Manager	Executive Management	Small Purchasers
Ethics	Ethics	Ethics	Ethics
Purchasing and Procurement 101	Contract Management 101	Executive Management Purchasing and Procurement 101	Small Acquisitions
Rules and Regulations	Rules and Regulations	Rules and Regulations	Rules and Regulations



Purchasing and Procurement 101

3 Modules

Module 1 – Purchasing & Procurement Introduction and Roles and Responsibilities

Basics of purchasing and procurement in State of WA

Introduces key purchasing and procurement steps

Roles and responsibilities of stakeholders involved in procurement

The importance of Contract Management

Risk Management for procurements

Briefly review basics on contract ethics

Module 2 – Key Rules and Regulations and Purchasing & Procurement Decisions

Brief history of Procurement Reform

Procurement phases and key decision points

Procurement options

Exceptions and exemptions

Direct buy

Competition

Sole Source and emergency procurements

Amendments

Module 3 – Purchasing and Procurement Processes

Details of purchasing and procurements

How to apply critical thinking to purchasing and procurement

Understanding the importance of competitive procurement

How to conduct competitive procurements

Understanding the importance of transparency in procurement



Purchasing and Procurement 101

Sneak Peek

Link to Materials

<http://des.wa.gov/services/ContractingPurchasing/PoliciesTraining/Pages/default.aspx>

P&P 101 Workbook example



Next Steps

- Purchasing & Procurement 101 offerings will be scheduled in Oct 2014 a min of once per month.
- Contract Management 101, Oct/Nov. 2014
- Small Purchases 101, next
- Executive Management, SME meeting in Sept. 2014



Thank you

Questions?

