



WA State Executive Management Purchasing & Procurement

Training Course
Date: 03/31/2015

Resource Guide

Use the resource guide for definitions, tips, and other assistance with purchasing, procurement, and contract management.



Purchasing, Procurement & Contract Management in Washington State; A Resource Guide for Executives

03/22/2015



Course Objectives

Upon completion of this course, participants will:

1. Become familiar with the intent of RCW 39.26 Procurement Reform in Washington.
2. Understand the Executive Management role and responsibilities for purchasing, procurement and contracts.
3. Describe purchasing and procurement functions and processes.





Training Credit

Course Overview

COURSE INTRODUCTION

DISCLAIMER:

AT THE TIME OF THIS PUBLICATION MARCH 30, 2015 ALL MATERIALS AND RCW'S REFERENCED ARE CURRENT. UPDATED COURSE WORK WILL BE MADE AVAILABLE IF AND WHEN REVISIONS ARE NEEDED. AS ALWAYS, CONFIRM CURRENT RCW REFERENCES.

Training Credit

You will receive credit for your participation in this training course.



Course Overview

Section One

Introduction
to
Purchasing,
Procurement
& Contract
Management
Training

Section Two

The
Purchasing
and
Procurement
Process

Section Three

The Contract
Management
Process

Section Four

Before
Things Go
Wrong





Procurement Training Program

Trained Professional Staff

Executive Roles in Purchasing, Procurement, & Contract Management

Key Aspects of RCW 39.26

Washington State Ethics

Professional Ethics

***INTRODUCTION TO PURCHASING,
PROCUREMENT & CONTRACT
MANAGEMENT TRAINING***

Procurement Training Program

What changed under the new law, RCW 39.26?

Who will participate in this training and certification program?



Key Aspects of the Procurement Reform Law

RCW 39.26

Delegation of Authority – Risk Assessment

Competition

Transparency

Social Responsibility

Performance Based Contracting

Training

Debarment



Washington State **Ethics**

RCW 42.52

Gifts

Conflict of Interest

Gain or Influence

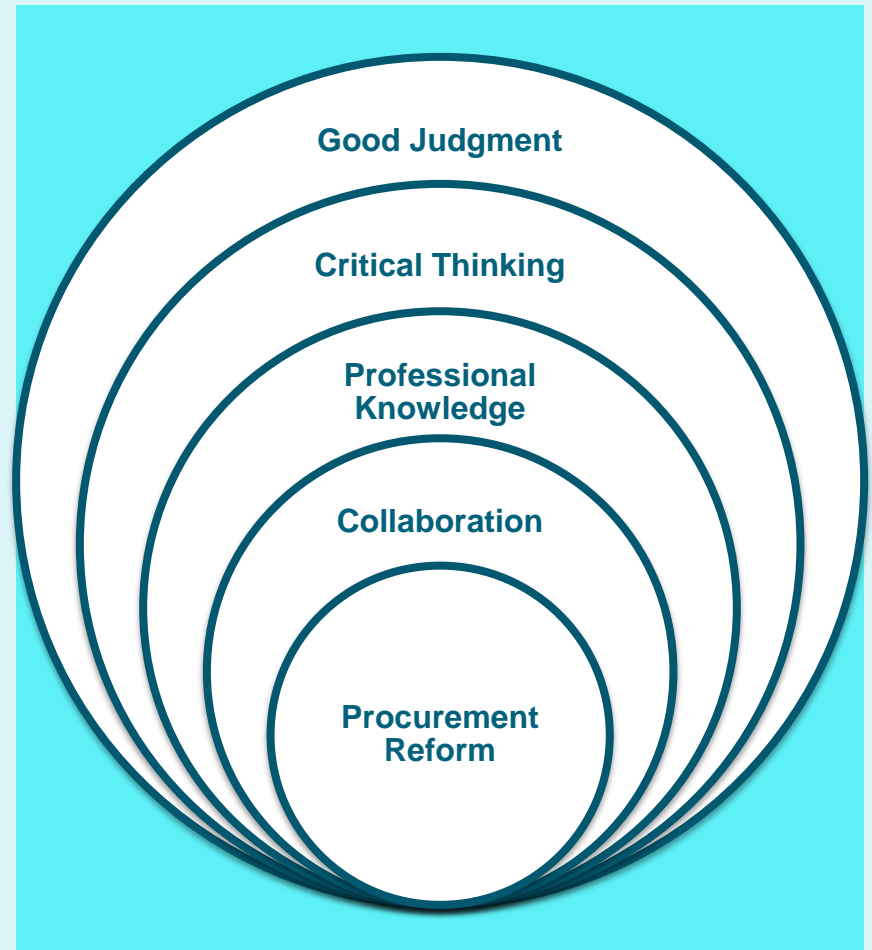
Decisions Based on Merit

Post State Employment



Collaboration and Critical Thinking

Procurement is a collaborative team effort that includes procurement and contracting professionals who exercise good judgment and critical thinking



Professional Staff Training

Current Courses

- Small Purchases
- Purchasing & Procurement 101
- Contract Management 101
- Procurement Ethics
- Executive Management

Anticipated Courses

- Certification path for Procurement Professionals
- Information Technology Academy
- Best Value Purchasing & Procurements
- Negotiations
- Performance Based Contracting
- Small and Diverse Business Outreach



The Role of Executive Management

In Purchasing, Procurement, & Contract Management

Strategic Vision

- **Provide strategic vision and support for procurements and contracting**

Executive Sponsorship

- **Supports and authorizes the procurement and contracting functions**

Delegation of Authority

- **Ultimately responsible for the purchase of goods and services within the organization**





Types of Acquisitions

Procurement Steps

Purchasing & Procurement Roles

Risk Mitigation in Purchasing & Procurement

THE PURCHASING & PROCUREMENT PROCESS

Types of Acquisitions

Small Purchases

Direct Buy Purchases

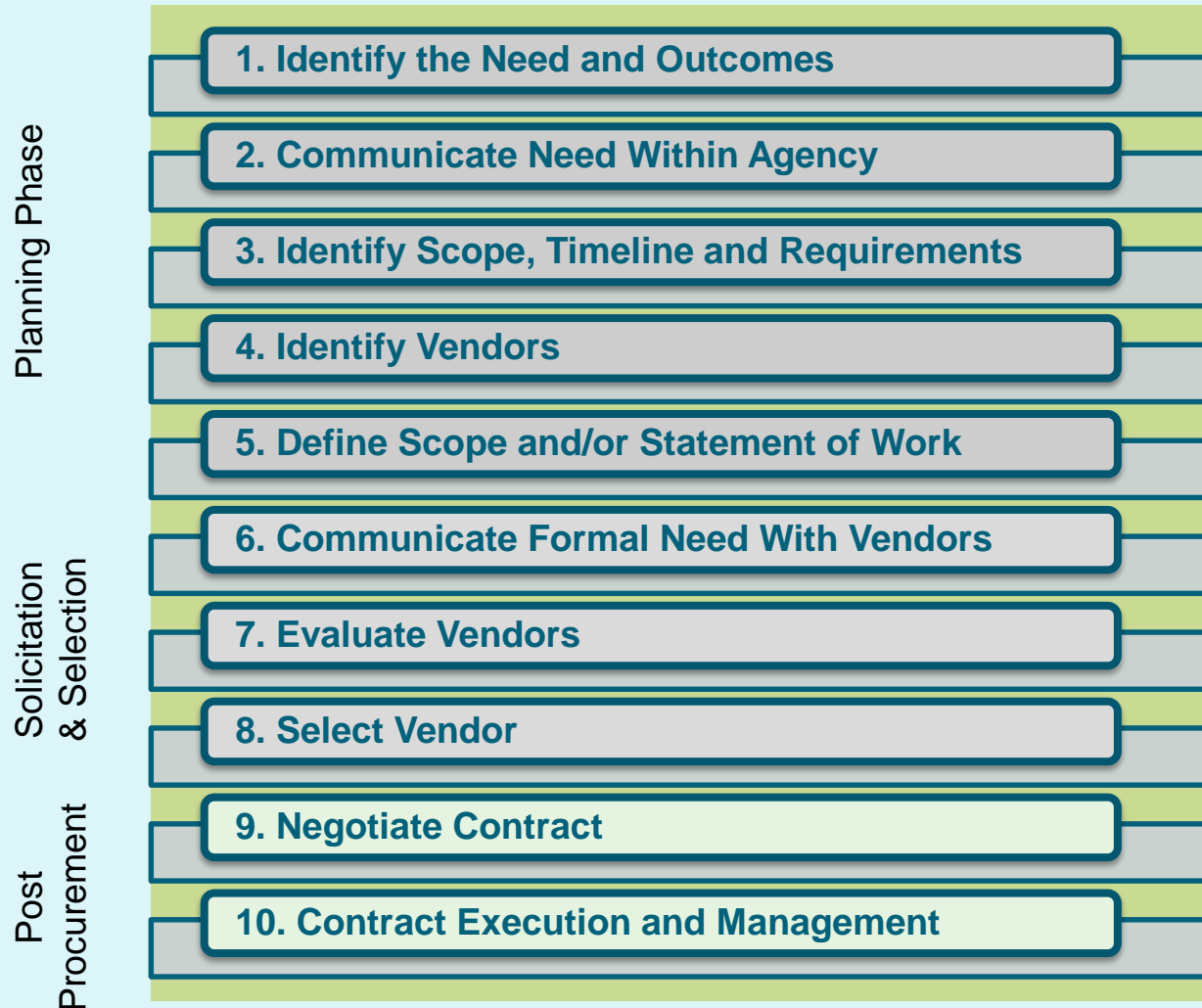
Competitive Procurements

Sole Source Contracts

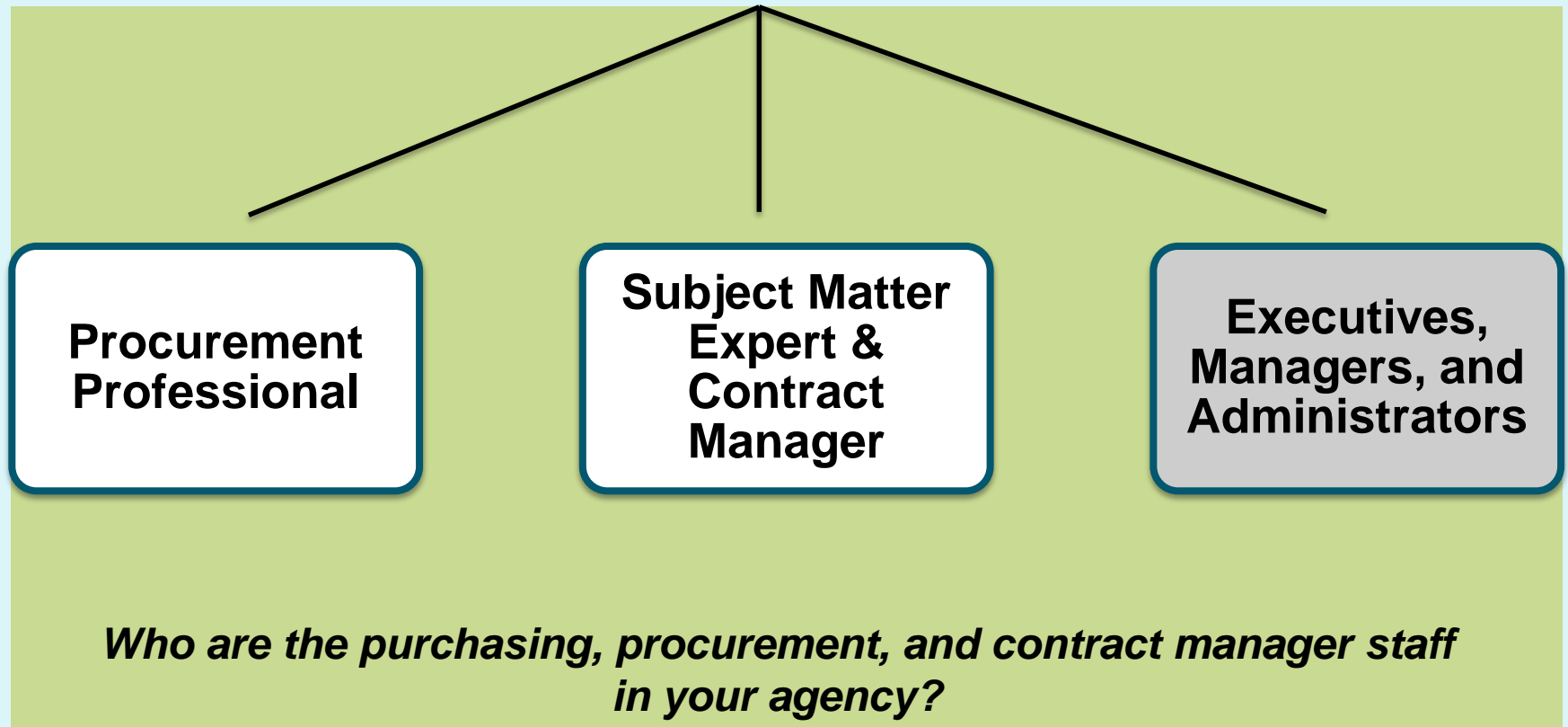
Emergency Purchases



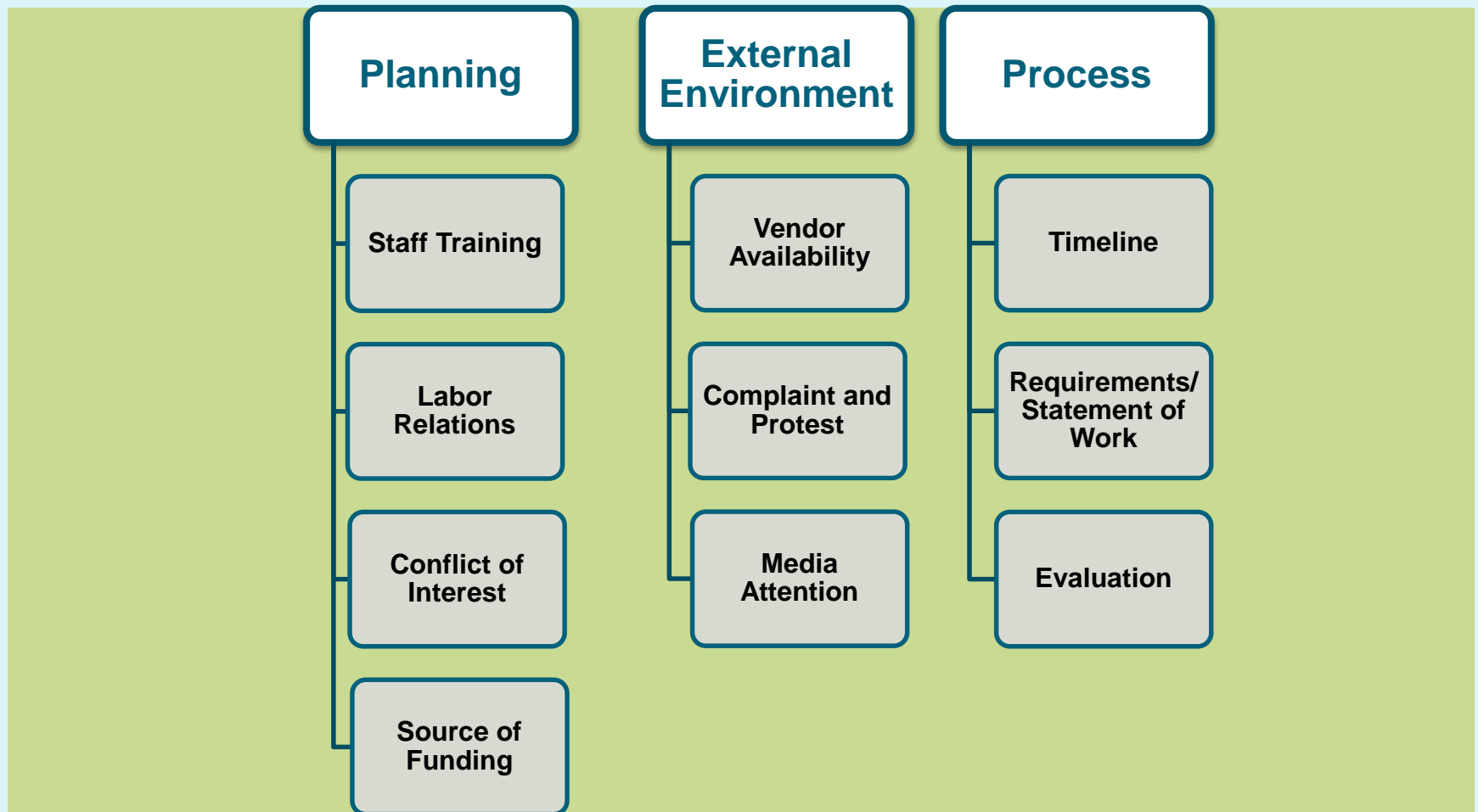
Procurement Process



Purchasing and Procurement Roles



Risk Mitigation in Purchasing & Procurement





Types of Contracts

Contract Issues

Risk Mitigation in Contract Execution

Reasons to Walk Away

Contract Management Communication

Contract Management Risk Mitigation

Contract Execution & Critical Thinking

Risk Mitigation in Contracting

THE CONTRACT MANAGEMENT PROCESS

Types of Contracts Covered

**Goods / Service
Contracts**

**Client Service
Contracts**

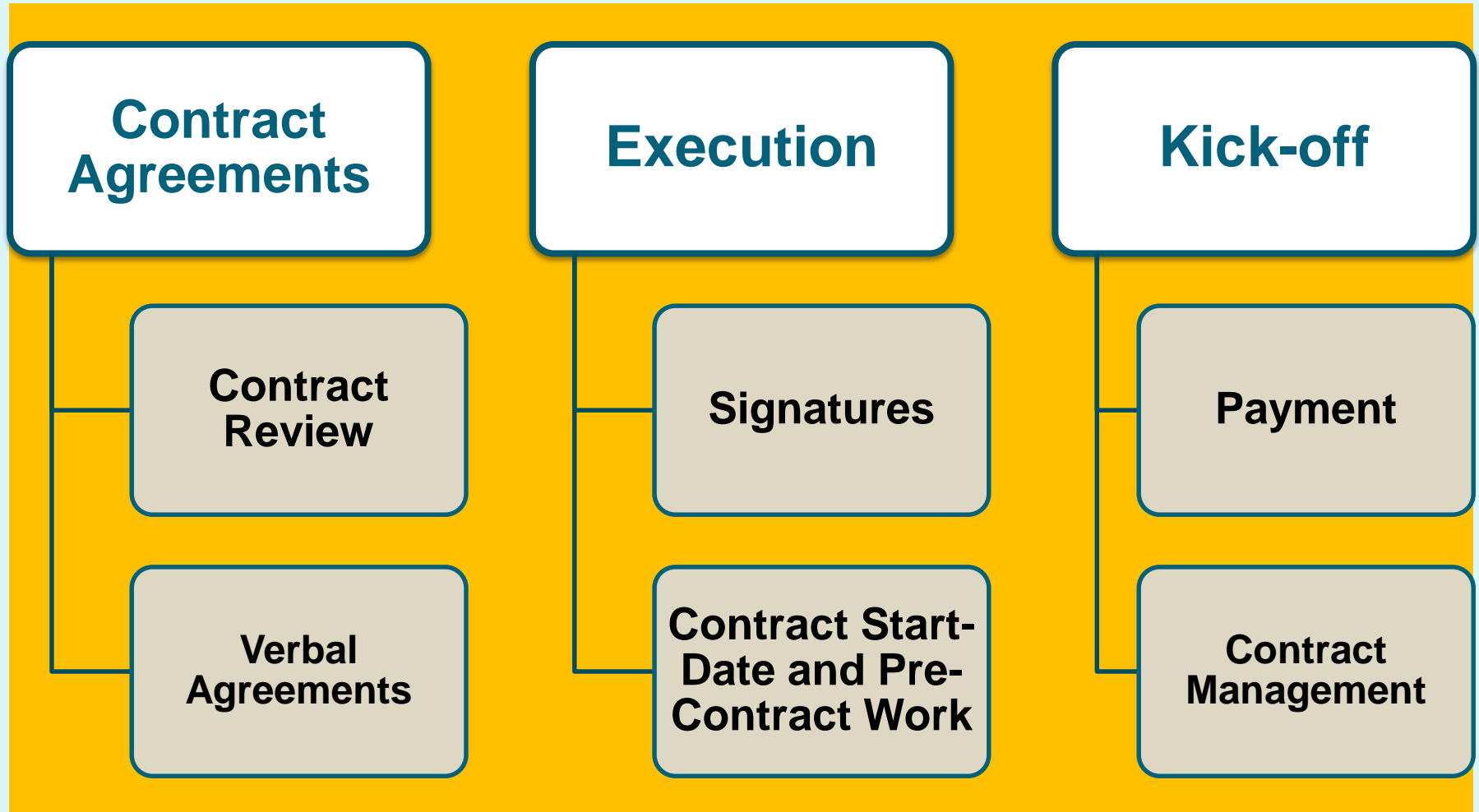
**IT Goods &
Services**



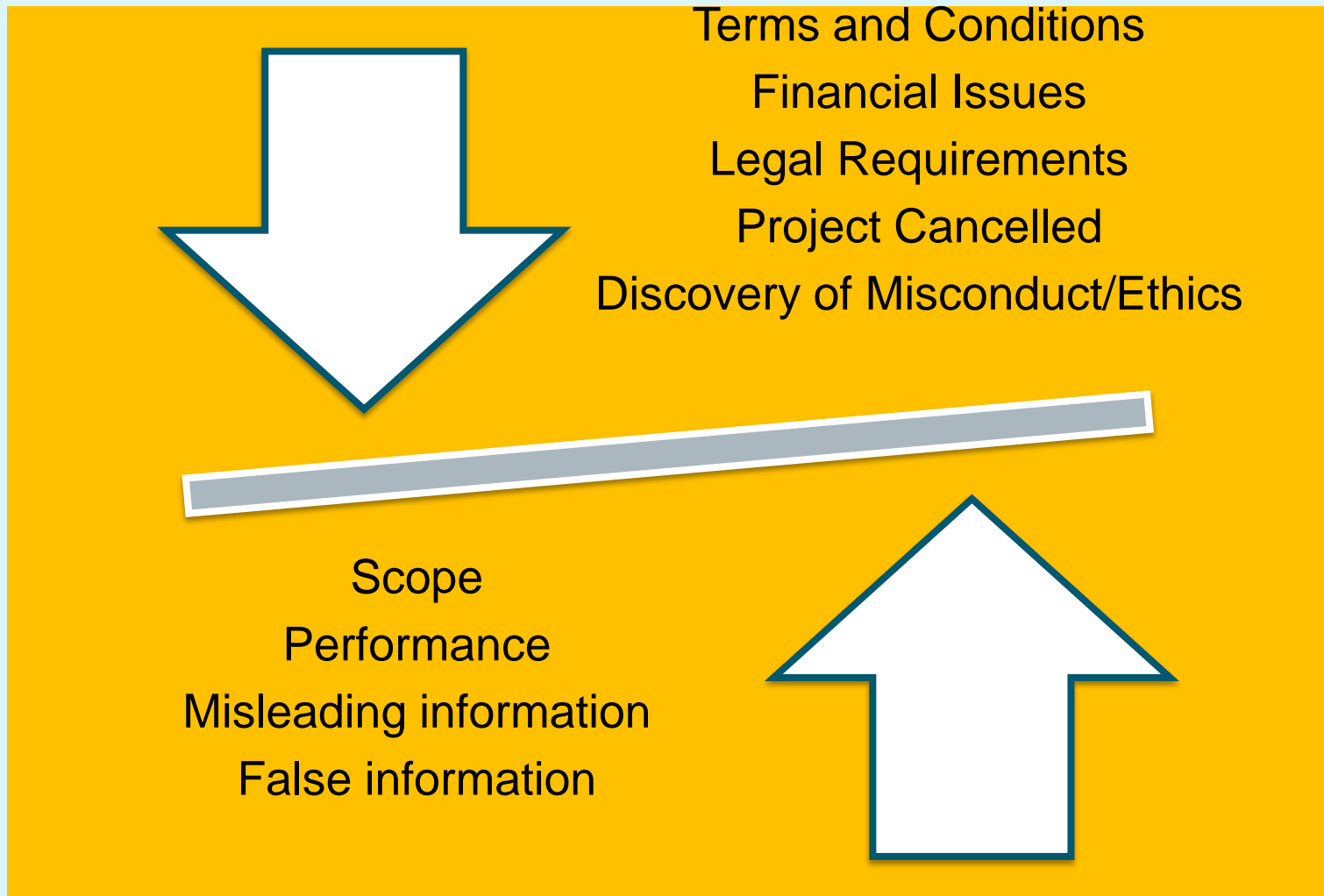
Contract Issues



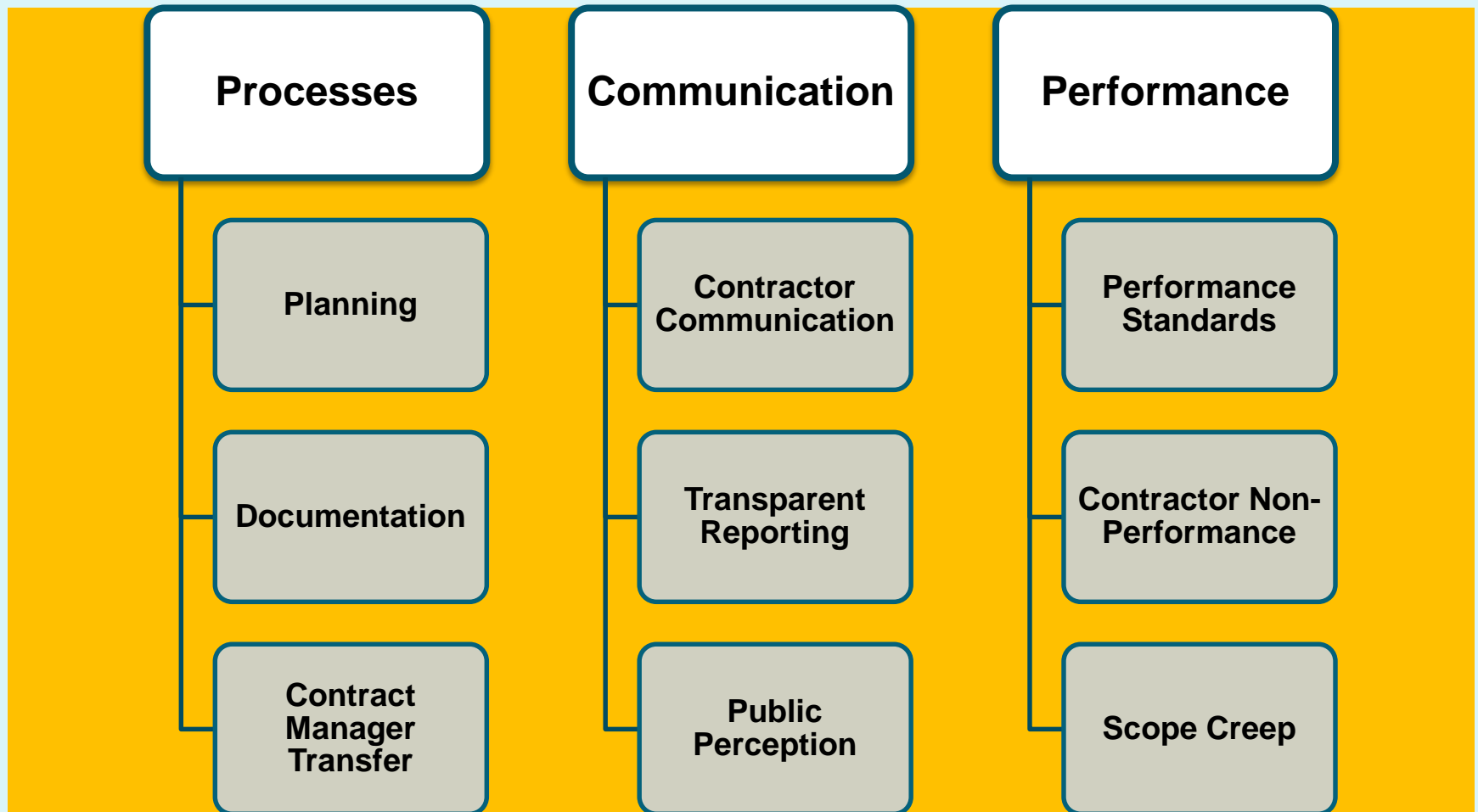
Risk Mitigation in Contract Execution



Reasons to Walk Away



Risk Mitigation in Contract Management





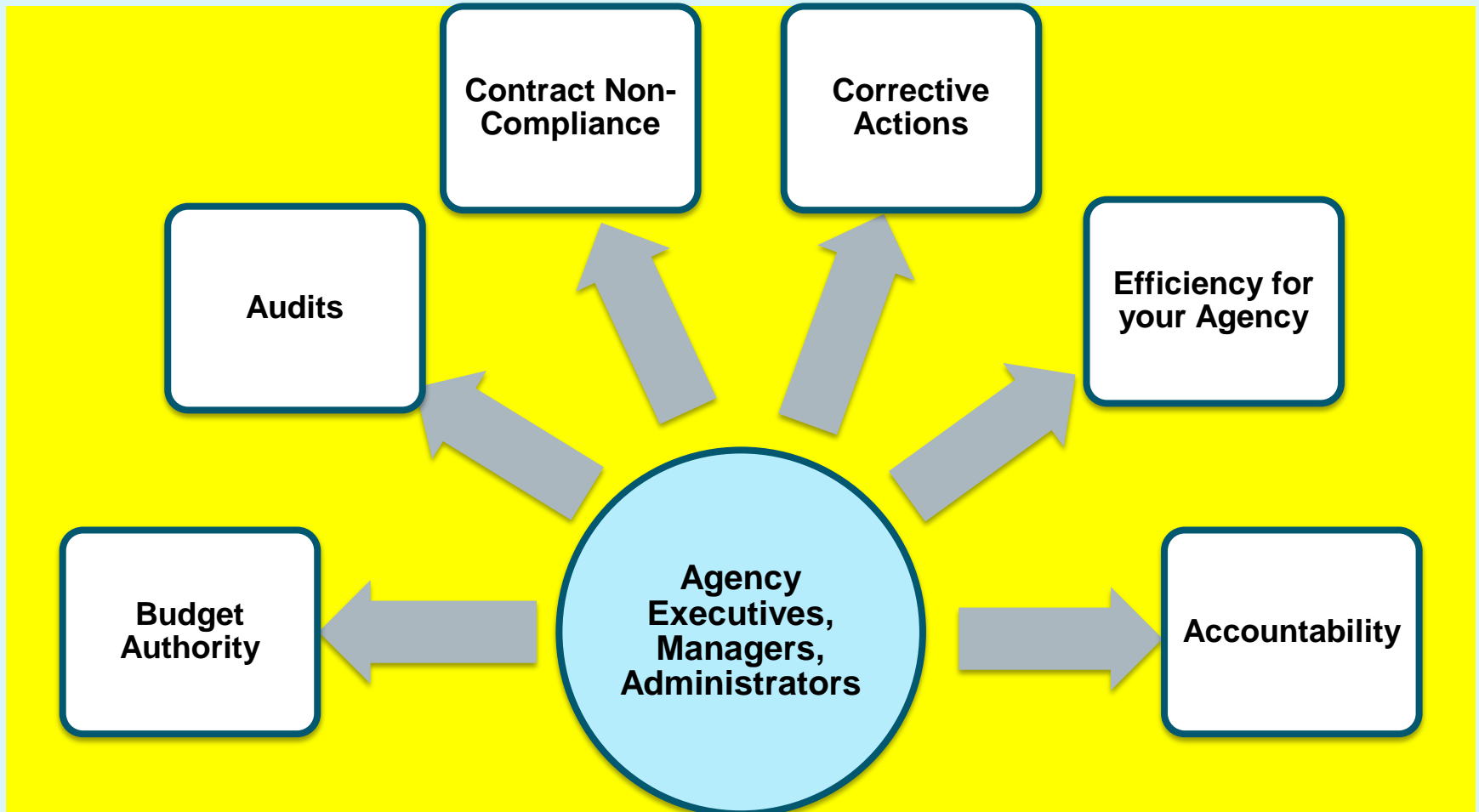
What Should You be Concerned About?

Keys to Success

Resources

BEFORE THINGS GO WRONG

What Should You be Concerned About?



Keys to Success

What do you have in your toolbox?



Resources

Who do you have on your team?

- Purchasing and Procurement staff
- Contracts staff
- DES staff and resources
- Assigned AAG

**As early as possible, bring the right people
onto your team**





Questions after the training? Call Cheryl Shaw, Contracts, Procurement, and Risk Management Training Manager at (360) 407-9376.



The Department of Enterprise Services is your partner and is here to help you with your procurement needs. Please contact us at (360) 407-2210.