


<b>SUBJECT:</b> Procurement Training	<b>NUMBER:</b> 107-009-0060
<b>DIVISION:</b> State Services Division State Procurement Office	<b>EFFECTIVE DATE:</b> 5-10-2010
<b>APPROVED:</b> 	

**PURPOSE:**

The Department of Administrative Services, through its State Procurement Office (State Services Division), oversees Oregon state government’s procurement training and certification programs. This policy outlines the various requirements, forms and procedures necessary for state employees to obtain the following certificates:

- Oregon Procurement Basic Certification – valid for three years
- Oregon Procurement Advanced Certification – valid for three years
- Oregon Small Procurement Certificate – valid for 10 years
- Oregon Contract Administration Certificate – valid for 10 years
- Administrative Certificate for Oregon Procurement – valid for 10 years

This policy supports consistency in soliciting and contracting in state government.

**DEFINITIONS:**

**“Proof of training”** means current attendance (class completion no older than three years) certificates, transcripts or letters from an agency supervisor.

**“Proof of work experience”** means letters or statements from previous or current employers.

**“Applicant”** means a person who applies for certification through DAS-SPO.

**“Approved” or “Approval”** means by DAS-SPO.

**“BA 161”** means the DAS-SPO class, “Principles of Public Contracting.”

**“Category 1”** means completion of at least 35 elective points.

**“Category 2”** means current national certification through the National Institute of Government Purchasing or the Institute for Supply Management.

**“Certificate”** means Recognition of Achievement.

**“Certification”** means experience, completion of required and elective training classes and a passing exam score. To maintain certification requires continuing education, which is available through a variety of education providers.

**“DAS-BAM”** means the price list of the Department of Administrative Services, Budget and Management Division.

**“DAS-SPO”** means the Department of Administrative Services, State Procurement Office.

**“Denied” or “Denial”** means an incomplete submittal or a submittal that does not meet eligibility requirements.

“**Exam Profile**” means exam conditions; example: closed book, three hours, 100 multiple-choice questions.

“**Fees**” or “**Fee**” means payment for certification or certificate applications, recertification applications, certification exams and training class registrations as published in the DAS-BAM Price List (see attachment).

“**Passing Score**” means a score of 70-percent or higher.

“**Point Values**” means the values assigned to training classes by the following calculation: one point per seat hour including corresponding increments for half- and quarter-hours. Acceptable classes include those offered by DAS-SPO, state agencies, procurement organizations (such as NIGP and Oregon Public Purchasing Association), educational facilities (colleges or universities) and professional development organizations. See section III, “Eligibility Requirements and Point Values” for how to apply point values.

“**Proctor**” means an exam (test) administrator.

“**Recertification**” means the process of renewing a certification by submitting an application before the certification expires; the renewal must include documents that show proof of training or continuing education.

**AUTHORITY:** ORS 279A.140 and OAR 125-246-0170

**APPLICABILITY:** State agencies under DAS procurement authority; other individuals, public bodies, and public agencies that seek certification from DAS-SPO.

**ATTACHMENTS:** Current DAS-BAM Price List. (The most current version appears online at <http://dasapp.oregon.gov/pricelist/index.asp>.)

**GUIDELINES:**

**I. Application Requirements for Certification or Certificate Programs**

- A. An applicant must send his or her application to DAS-SPO; DAS-SPO will approve or deny the application, and as appropriate, issue the certification or certificate.
- B. Documents that show proof of training or work experience become part of an applicant’s file maintained by DAS-SPO.
- C. DAS-SPO will deny incomplete applications or applications that do not meet eligibility requirements, and return the applicant’s documents.
- D. Fees for a certificate or certification program must accompany the application.
- E. DAS-SPO will review applications within three weeks.

## II. Application Requirements for Recertification

- A. An applicant must send his or her application for recertification of a basic or advanced certification to DAS-SPO.
- B. The required training must have occurred within three years of the certification issue date. Documents that show proof of training become part of an applicant's file maintained by DAS SPO.
- C. DAS-SPO will deny applications that do not meet recertification eligibility requirements.
- D. Fees for recertification must accompany the application.

## III. Eligibility Requirements and Point Values

Each certification or certificate program has its own minimum procurement experience and training requirements, as outlined below.

- A. Oregon Procurement Basic Certification\* (OPBC) requirements:
  - One or more years of procurement experience;
  - Successfully complete the class "Principles of Public Contracting" (BA 161);
  - Complete 35 points of elective training (21 points must come from DAS-SPO classes; the remaining points may come from other sources with a maximum of seven points from professional development organizations);
  - Meet requirements of either Category 1 or Category 2. (See Definitions); and
  - Pass the OPBC exam.
  - Recertification requires 21 points of training (14 points must come from DAS-SPO classes; the remaining points may come from other sources) within three years of last issue of the certification.
- B. Oregon Procurement Advanced Certification\* (OPAC) requirements:
  - Three or more years of procurement experience;
  - Current OPBC and OCAC;
  - Completion of an independent work study project; and
  - Pass the OPAC oral presentation exam.
  - Recertification requires 21 points of training (14 points must come from DAS-SPO classes; the remaining points may come from other sources) within three years of last issue of the certification.

\*Applicants must complete the certification requirements for OPBC or OPAC within the three years prior to submitting an application to DAS-SPO.

- C. Oregon Small Procurement Certificate\*\* (OSPC) requirements:
  - Completion of DAS-SPO classes: “Direct Purchase and Negotiation” and “ORPIN Full System Training”; and
  - Completion of seven points of DAS-SPO elective training.
- D. Oregon Contract Administration Certificate\*\* (OCAC) requirements:
  - Completion of DAS-SPO classes: “Contract Administration,” “Rules Overview,” and “Procurement Ethics.”
- E. Administrative Certificate for Oregon Procurement\*\* (ACOP) requirements:
  - Completion of DAS-SPO class, “Procurement Rules, Ethics and Risk Management”; and
  - Completion of seven points of DAS-SPO elective training.

\*\*Certificates do not require examinations or continuing education and are not renewable.

#### **IV. Training Classes**

- A. An attendee must register for DAS-SPO classes through the state’s learning management system\*. Seats are on a first come first serve basis. Attendees unable to secure a seat will be placed on a waitlist and will be notified as cancellations occur. \*<https://ilearn.oregon.gov>
- B. An attendee will only receive points for a class if they attend at least 90-percent of the class. DAS-SPO will consider special cases for lesser attendance on an individual basis.
- C. An applicant must submit proof of class attendance with his or her application for certification.
- D. Section III, “Eligibility Requirements and Point Values” outlines calculations for point values. An applicant must obtain his or her points within the three years prior to submitting an application for certification. For OPBC certification or recertification, the maximum number of points an applicant may submit from professional development organizations (organizations whose focus is education and training for career advancement or skill development that may not relate to procurement) is seven.

#### **V. Examination Requirements for Certification**

- A. Certifications for OPBC and OPAC require a passing score of 70-percent or higher on exams.
- B. Exam fees for certification and recertification appear in the DAS-BAM Price List.

- C. An applicant can fail a certification exam three times. If he or she fails a fourth time, they must re-take the DAS-SPO class, "Principles of Public Contracting." No limit exists on how many times applicants may take this class.
- D. Applicants who wish to re-take a failed exam must wait until the next scheduled exam session.
- E. Exam profile for OPBC: closed book, takes three hours, and involves multiple-choice questions on topics from DAS-SPO workshops or class materials, and general knowledge of procurement based on experience.
- F. Exam profile for OPAC: an oral presentation to a group of peers as determined by DAS-SPO.

## VI. Appeals

- A. To appeal a denied application, the requester must submit a written appeal to DAS-SPO within 15 business days from the date of denial; DAS-SPO does not allow appeals on recertification applications.
- B. DAS-SPO will grant a final decision on appeal requests within 30 calendar days.

## VII. Refunds

- A. Fees for certification, including recertification or certificate programs, are non-refundable.
- B. Fees for class registrations, generally, are non-refundable.

## PROCEDURES:

### I. Application for Certification, Recertification or Certificate Programs

<u>Step</u>	<u>Responsible Party</u>	<u>Action</u>
1.	Applicant	<u>Certification</u> : completes the application; attaches proof of the required experience, training and passing exam score, and fee; and sends to the DAS-SPO training team for approval.  <u>Recertification</u> : completes the application; attaches proof of training and fee; and sends to the DAS-SPO training team for approval.  <u>Certificate</u> : completes application; attaches proof of training and fee; and sends to the DAS-SPO training team for approval.
2.	DAS-SPO	Reviews application. If approved, issues certification or certificate. If denied, issues a denial letter that includes information on the appeal process.
3.	Applicant	If desired, sends appeal request in writing according to section VI, "Appeals."

4. DAS-SPO                      Reviews appeal requests and issues written decisions.

**II. Certification Exams**

**Step   Responsible Party   Action**

1.      Applicant                      Sends exam registration to DAS-SPO and pays fee. Sends DAS-SPO a written request for any special accommodations, including whether the applicant wants a large-print version of grade results.
2.      DAS-SPO                      Proctor conducts exam and gives grade results to applicant.

**III. Address for DAS-SPO**

DAS-SPO Training Team, General Services Building, 1225 Ferry Street SE, Salem, OR 97301