OPAC Guidelines

DAS Procurement Services
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Oregon Procurement Advanced Certification (OPAC)

Purpose

The Oregon Procurement Advanced Certification (OPAC) program gives candidates the ability to obtain credit for accomplishments and to capture learning gained on the job. Benefits range from personal learning to enterprise-wide improvements.

Growth and development occurs when taking on new challenges. OPAC projects are meant to be real-time efforts that tangibly reduce risk, save money or otherwise provide value. Through the OPAC program, procurement initiatives often demonstrate efficiencies, innovation, transferability or service improvements that may be adopted by government agencies as best practices. As OPAC projects are completed lessons learned and new tools or methods are shared with a peer review group and can be published on the Procurement Commons in iLearn, the state's learning management system.

Process Overview

Begin by reading the requirements for advanced projects described in this application packet. If a project appears to qualify, submit a **project proposal** to DAS Procurement Services (PS) training team for evaluation. The project submittal and initial application process are similar to responding to a Request for Proposal (RFP) so provide enough information for the project reviewers to recommend approval. The Training Advisory Group (TAG sub-committee of the Designated Procurement Council) will evaluate the proposal and provide feedback and recommendations to PS trainers.

Upon project approval, an independent work-study plan, based on a self-assessment, learning objectives, and goals, is developed with assistance from a PS trainer who will be assigned as a project coach. The training coach can help locate a procurement mentor if necessary. Candidates are required to complete progress reports and check in with coaches as established in the work-study plan. A final report summarizing the project and outlining benefits and values is produced by the candidate. Coaches can provide guidance and feedback in producing the report and any other presentation materials. The last step in the process is an oral peer review. Candidates may choose how to present their projects and reports to an evaluation team and guests in a public speaking setting.

Every project is an opportunity to learn or to be creative. Great learning can occur even if a project is terminated early due to unexpected circumstances. Less than perfect projects often provide the most learning value. There are learning objectives embedded in every part of this process from proposal to peer review. But, first hand experiences are the key to success and capturing them can be the foundation for innovative change.

Important Note

OPAC projects are not meant to be backward glances at projects that are finished or well on the way to completion. Projects may be based on a specific phase or stage; however, there must be distinct goals, objectives, and responsibilities for the candidate in the proposal for that phase which meet advanced project criteria.

Consider *Life-Learning Papers* to report lessons learned on completed projects. *Life-Learning Papers* receive seven points that can be used toward recertification of the Oregon Procurement Basic Certification (OPBC) and also can be published on the Procurement Commons.

OPAC Project Criteria

Letters of Support

Candidates and projects must have agency support. A manager or Designated Procurement Officer (DPO) must endorse the candidate and project in writing. A letter (1-2 pages) needs to be submitted with the project proposal to PS. Letters should list details such as timelines, constraints, desired outcomes or other considerations that will be included in the work-study plan making the process a good fit for the candidate and agency.

Examples of Information for Letters of Support

- A statement of support for the candidate and project indicating allowances for time to complete progress notes, reports, and peer reviews
- A brief description of the focus and scope of the project and why it is believed to be an advanced project
- Identifies elements of the project that are new for the candidate and how the candidate will be challenged to grow from personal learning
- Describes how the project solves old problems with new approaches or anticipated benefits that will meet agency's needs

Proposal Introduction

Begin with a brief introduction that describes the purpose and scope of the project. It is helpful to provide an overview of the implementation process being used for the project. Generally, an advanced project introduces new or modified processes, procedures or strategies that will provide a meaningful experience for the candidate and add value to the candidate's agency. In addition, these benefits should be transferable to other agencies as best practices or enterprise improvements. Keep in mind that advanced projects are intended to develop skills, knowledge and leadership abilities.

Project Description

Descriptions expand on the information (listed above) in letters of support and the proposal introduction. They are written from the candidate's perspective and should include candidate opinions on how the project will create growth or exposure to challenging situations. Also include why this is an advanced project and describe if or how the project will incorporate best practices such as information from training classes, project management guidelines, process improvement analysis or professional resources.

A project timeline must be included. This could be a Gantt chart or simple table. If appropriate, break the project into phases such as research, specification development, and posting and award. If phases are included, be sure to state desired outcomes, known obstacles and any resources needed to complete each phase. Also describe the people or stakeholders who will partner on this project. The intent is not to list all approvals unless unique to this project but to identify collaboration opportunities and efforts. Be sure to include any other information that will help the reviewers accept the proposal.

Examples of Advanced Project Attributes

- Highly visible or politically sensitive
- Involves multiple funding sources
- Complex with high-risk elements
- Requires extensive analysis and research
- Introduces new or modified processes, procedures or strategies that can be replicated (transferability) or used as a template for others
- Includes high-level planning & development, negotiation, contract administration skills or technical expertise
- Unique or innovative method or way of doing business or meeting needs
- Impacts the delivery of services by improving results and creating efficiencies
- Substantial cost reductions are realized through implementation of the project

Personal Learning Objectives & Project Goals

Objectives and goals must correlate to personal growth and project performance. The intent is to determine a base point or benchmark to measure against at the end of the project. Personal learning objectives and project goals are founded on skill, knowledge and ability assessments in the following areas: (1) technical expertise; (2) procurement-related activities and experience; (3) communication and analytical thinking; (4) time management and planning; and (5) determining priorities.

The most effective objectives are stated clearly in terms of who (candidate(s)), what will occur (outcomes or changes); how (implementation strategies), where (influence or impact), and when (duration). Goals are best stated as SMART: specific, measureable, achievability, relevant, and time-specific or tangible. When developing project goals be sure to identify target audiences and any evaluation criteria.

Examples of Advanced Skills and Project Goals

- Development of new contract terms and conditions, funding arrangements or policy interpretation throughout the pre-award to post-award processes
- Development and implementation of a negotiation plan based on a best practice model that achieves or exceeds expected results
- Risk analysis and development of effective ways (beyond insurance and bonds) to mitigate potential losses
- Requires extensive analysis and research
- Introduces new or modified processes, procedures or strategies that can be replicated (transferability) or used as a template for others
- Includes high-level planning & development, negotiation, contract administration skills or technical expertise
- Unique or innovative method or way of doing business or meeting needs
- Impacts the delivery of services by improving results and creating efficiencies
- Substantial cost reductions are realized through implementation of the project

Process Steps Summary

Step 1: Application and Project Pre-work includes:

- Developing your project concept
- Obtaining management support
- Formalizing your proposal and sending it to PS
- Establishing your project work plan

Step 2: Project Completion includes:

- Working your project (meeting benchmarks and milestones)
- Completing progress reports (capturing lessons learned)
- Drafting your overall project report

Step 3: Peer Review Presentation includes:

- Finalizing your project report
- Developing your presentation materials
- Scheduling the peer review session
- Making the presentation

Keys for Success

There are some prerequisites for obtaining an OPAC. Candidates should have all prerequisites completed before sending in the project proposal. These include experience and Oregon credentials.

- Experience: at least three years of contracting experience. The goal is to select candidates who have advanced knowledge and direct experience with procurement processes. Those with occasional procurement work or mostly low-level task experience such as ordering off price agreements may not have the level of experience necessary for an advanced certificate. DPOs must provide verification of experience in the letter of support.

- Credentials: OCAC and OPBC. Candidates must have a current (active) Oregon Contract Administration Certificate (OCAC) **and** an Oregon Procurement Basic Certification (OPBC). Those with expired or lapsed credentials will not be considered for advanced projects.

Another key for success is a well-planned presentation for the peer review. The peer review panel consists of PS trainers and representatives from the DPO Council. Candidates and trainers may invite guests to the presentation (non-reviewers) as audience supporters and attendees. The agency DPO may attend but cannot be a co-presenter. Do not rely on the DPO as they cannot introduce the presentation or participate as evaluators. Peer review rating criteria is based on the type of project, goals and objectives, outcomes and the learning that takes place. Candidates may choose the presentation format; however, it very important to have a well-organized final report available prior to the presentation for the reviewers. Reports should contain the following information:

- Overview of the project
- Purpose and objectives/goals
- Projected outcomes and measures of success
- Major steps, barriers or obstacles and responses
- Unexpected accomplishments
- Final outcomes and lessons learned
    - Learning for the candidate
    - Learning for the agency
    - Learning for the enterprise

Examples of Presentation Formats

- PowerPoint slide show
- Tool or technique demonstration
- Lecture with handouts (process analysis)

The most impactful key for success is the work-study plan. It will keep the candidates on track and accountable. Coaches will use it to guide candidates through processes. The plans help ensure all components of the

project are captured, documented, and included in the peer review presentation materials.

Templates and materials for getting started are in the appendix to this document. Each project and candidate is unique so one-size does not fit all. Use these documents as guides NOT fill-in the blank forms for specific projects.

Good luck!

Frequently Asked Questions

1) What is the PS training role in the OPAC process?
    a. PS trainers review project applications for completeness; they act as coaches or advisors; provide information and monitor the project's process; and help to remove any process obstacles. The PS trainer's goal is the help candidates be successful.
2) What happens if the project proposal is not approved?
    a. Talk with the PS trainers. They can help you reframe the project goals or select a more appropriate project.
3) Is a project that involves more than one agency acceptable?
    a. Yes, in fact, collaboration is encouraged. When multiple agencies are involved, clear roles and responsibilities must be identified. Projects that involve a job rotation or a projects at other agencies often provide candidates with expanded knowledge.
4) Can more than one person get credit for the same advanced project?
    a. Yes, teams often work on large or complex procurements. Each candidate must have a distinct focus, responsibility and work-study plan for credit to be granted.
5) What happens if I quit or change agencies in the middle of a project?
    a. In most cases, projects will terminate or be transferred to another employee. Candidates must notify PS of the changes and can reapply with a new project at a new agency if desired.
6) What are the costs associated with OPAC?
    a. $150 which is due when the proposal is approved.

Appendix A

Templates/Forms:

- Sample Letter of Support from manager, DPO, or supervisor endorsing participation
- Template for Project Description (add more information if necessary)
- Progress Notes form
- Project Proposal Application (apply through iLearn)
- Credential Application (apply through iLearn)

Sample Letter of Support

Submit the letter of support along with the project proposal to PS training.

DATE:

TO: DAS Procurement Services (PS)
ATTN: Training
1225 Ferry St. SE, U140
Salem, OR 97301

RE: Letter of Support for OPAC Project—[candidate's name]
OPAC Certification Project: [title]

Dear PS Trainers,

I support [candidate's] proposal for [his or her] Oregon Procurement Advanced Certification (OPAC).

[Candidate's name] has met the criteria for an OPAC project, including 3 years of experience and appropriate Oregon credentials.

The project is [name or brief description of project; e.g., an RFP for an on-line system for boating registrations]. This will provide several benefits for our procurement section and also for [candidate]: [list expected benefits, e.g.,]

- (example) Close collaboration at the beginning of the project between the program manager, the procurement staff, suppliers at the market research stage, and end-users. This collaboration has been lacking and this project will serve as a useful pilot and hopefully establish new working norms.
- (example) Experience with a multi-step RFP that allows demonstrations, interviews, and revised proposals.
- (example) implementing a debrief session with the suppliers who did not receive the RFP award.

I understand that regular progress reports will be submitted on the project and periodic meetings also will be held. I fully support [person] to commit time and effort to this project as part of their job duties. Should unforeseeable events occur that prohibit ongoing active participation in this project, PS will be promptly notified.

Sincerely,
(manager/supervisor/DPO)

Project Description Template

Name of Candidate:

Title/Short Description of Project:

Date:

Anticipated Start/End Dates of Project:

Project Details

- Describe the scope of this project. Include expected outcomes.
- Describe your role.
- Describe how this project will incorporate best practices and new procedures.
- Provide an estimated project timeline. Include project phases if appropriate.
- List the people with whom you will partner on this project such as members of the project team.

Personal Learning

- What are your personal goals or objectives?
- How will attaining these assist your career path?
- How do you intend to share your learning with others in your organization?

Project Reporting Form

Name: _____ **Agency:** _____

Position: [e.g. Procurement and Contracts Specialist (PCS) ___]

Contact Information: _____

OPAC Contact List	Phone Number / Email
(mentor)	
Vicky Narkon	503-378-4663 Vicky.Narkon@oregon.gov
Sandi Kalin	503 378-4721 Sandi.Kalin@oregon.gov

PROJECT	Title
Agency	Name of Candidate:
DOJ (optional)	Representative:
TECH SPECS	Names, Agencies, Emails:
PS	Other Analysts assigned to project:
MGT	
TIMELINE	
NOTES	

Subject	Brief Description:
Situation	
Observation	
Application	
Plan (Goals)	

PROGRESS REPORT		
Date	**Progress Report Notes**	**Lessons Learned/New Practices**