

 STATEWIDE POLICY	NUMBER 107-009-0060	SUPERSEDES Policy 107-009-0060 dated 05/10/2010
	EFFECTIVE DATE December 27, 2018	PAGE NUMBER Page 1 of 3
	REVIEWED DATE December 27, 2018	
Division Enterprise Goods and Services	REFERENCE/AUTHORITY ORS 279A.159 OAR 125-246-0140 OAR 125-246-0165 OAR 125-246-0170 Statewide Procurement Training Procedure: 107-009-0060 PR	
Policy Owner Procurement Services		
SUBJECT Statewide Procurement Training	APPROVED SIGNATURE Katy Coba, Director <i>(signature on file with DAS Business Services)</i>	

PURPOSE

The Department of Administrative Services, Procurement Services, oversees Oregon state government's procurement training and certification programs. This Policy supports statewide compliance with ORS 279A.159 and OAR 125-246-0140.

APPLICABILITY

This Policy applies to any person who conducts a Procurement or administers a Public Contract for any State Contracting Agency. State Contracting Agency is defined in ORS 279A.010(1)(nn) and means an Executive Department entity authorized by law to conduct a Procurement. This Policy does not apply to the Secretary of State or State Treasurer. This Policy does apply to any person seeking Certification; however using this Policy does not otherwise subject an agency to DAS authority.

The requirements of this Policy are in addition to, and do not supersede, modify or replace, other existing legal responsibilities of any State Contracting Agency.

DEFINITIONS

In addition to these definitions, capitalized terms are defined in OAR 125-246-0110.

Agency or State Contracting Agency: is defined in ORS 279A.010(1)(nn) and means an Executive Department entity authorized by law to conduct a Procurement. Executive Department is defined in ORS 174.112, and generally means all statewide elected officers other than judges. It also includes all boards, commissions, departments, divisions and other entities within the Executive Department as described in the Oregon Constitution.

Certificate: means written evidence that a person has successfully completed the assessment of a Learning Event or a series of Learning Events. A Certificate demonstrates attainment of knowledge rather than mastery of a skill.

Certification: means written evidence that a person has achieved proficiency in a skill or task objectively assessed and validated against Oregon and national criteria.

Chief Procurement Officer, CPO, or State Chief Procurement Officer: means the person designated and authorized by the Director of the Department of Administrative Services to perform certain procurement functions described in the DAS Public Contracting Rules, or the Chief Procurement Officer's delegate.

Contract or Public Contract: is defined in OAR 125-246-0110(32) and means an agreement between two or more persons, which creates an obligation to do or not to do a particular thing. Contract essentials include competent parties, subject matter, a legal consideration, mutuality of agreement, and mutuality of obligation.

Knowledge, Skills, and Abilities: means the attributes required to perform a job.

- Knowledge - refers to a body of information applied directly to the performance of a function.
- Skills - refers to an observable competence to perform a learned action.
- Abilities - refers to competence to perform an observable behavior or a behavior that results in an observable product.

Learning Event: means a learning, training, or development activity completed through participation in a workshop, class, conference or eLearning.

Oregon Procurement Body of Knowledge (OPBoK): means a comprehensive list of the tasks, knowledge, skills, abilities and standards that define the necessary Procurement concepts for State Contracting Agencies. This list is the foundation for Learning Event development and serves as a roadmap for persons preparing for Certification testing. The OPBOK ensures alignment of Oregon Public Procurement Training and Certification with critical skills and knowledge needed for competent performance in Oregon public Procurement. View the OPBOK on the [DAS PS Training website](#).

Oregon Public Procurement Training: means training predominately related to Procurement that concurs with the contents of the OPBOK, contains a formal assessment and is approved by the State Chief Procurement Officer.

Procurement: means the act of purchasing, leasing, renting, or otherwise acquiring or selling: Supplies and Services; Architectural, Engineering, Photogrammetric Mapping, Transportation Planning or Land Surveying Services and Related Services; and Public Improvements. Procurement includes each function and procedure undertaken or required by an Agency to enter into a Public Contract, administer a Public Contract and obtain the performance of a Public Contract under the Public Contracting Code, and the applicable Public Contracting Rules. Procurement includes Contract Administration. Contract Administration includes Amendments.

EXCLUSIONS AND SPECIAL SITUATIONS

The State Chief Procurement Officer determines disputes, requests for exception, requests for waiver or sub-delegation relative to this Policy.

POLICY GUIDELINES

I. Roles and Responsibilities

1. The State Chief Procurement Officer's duties and responsibilities according to OAR 125-246-0170(3) include:
 - a. Establishes standards of required education, training, experience, or a combination thereof pursuant to ORS 279A.159 and OAR 125-246-0140;
 - b. Establishes and implements an Oregon State Procurement Certification program;
 - c. Provides training and instruction opportunities to ensure Agency staff are equipped with necessary knowledge and skills to comply with the standards;
 - d. Approves programs or persons that satisfy the standards, and determines any disputes, requests for exception, requests for waiver or sub-delegation;
 - e. Sets dates by which agency staff must meet the requirements of ORS 279A.159.

2. Agency managers must ensure any person under their control has adequate education, training, professional experience, or a combination thereof, which prepares the person to conduct a Procurement or administer a Contract according to the complexity, scope or category of Procurements the person conducts, and standards established by DAS.
3. A person who conducts a Procurement or administers a Contract for a State Contracting Agency must meet the required education, training, professional experience, or a combination thereof, to conduct said procurement activities.

If this person does not have the required education, training, professional experience, or a combination thereof in accordance with the standards established by DAS pursuant to ORS 279A.159, OAR 125-246-0140, and this Policy, they must:

- a. Have a Written delegation from a person who currently meets the standards; and
- b. Have their actions directly reviewed and approved by a person who currently meets the standards and requirements.

II. Training Program Standards

1. Training standards are set according to ORS 279A.159 and OAR 125-246-0140 to ensure adequate training, education and experience:
 - a. Describes the content and quality of a curriculum for an appropriate education or training program;
 - b. Fixes a passing score for an examination or assessment, if appropriate;
 - c. Specifies requirements for obtaining a certificate or other evidence that proves education or training program completion;
 - d. Determines the skills, level, and depth of knowledge a person must obtain from the education or training program; and
 - e. Describes the length of service or other evidence of adequate experience that a person must have in order to conduct a Procurement or administer a Public Contract for a State Contracting Agency.
2. These standards also establish the levels or classifications of education, training and experience necessary for a person to conduct a Procurement or administer a Public Contract for a State Contracting Agency according to:
 - a. The complexity, scope or category of procurements a State Contracting Agency conducts;
 - b. The degree of responsibility a person will have for conducting a procurement or administering a Public Contract; or
 - c. Other appropriate criteria.

III. Curriculum Design and Development

1. The OPBOK guides curriculum design and development. The OPBOK consists of:
 - a. Tasks associated with the procurement process;
 - b. Knowledge, skills, and abilities associated with the procurement process;
 - c. References to the specific standards that define the why, what and how of the task (such as: Oregon Revised Statutes, Oregon Administrative Rules, DAS Policies, and the DAS website and Oregon Procurement Manual.)
2. Each Oregon Public Procurement Training Learning Event must have a formal assessment, as appropriate.
3. To the extent practical, Learning Events should be accessible in the State Learning Management System, iLearnOregon.