

 STATEWIDE PROCEDURE	NUMBER 107-009-0060_PR	SUPERSEDES
	EFFECTIVE DATE December 27, 2018	PAGE NUMBER Page 1 of 6
	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 Policy: 107-009-0060	
Policy Owner Procurement Services		
SUBJECT Statewide Procurement Training	APPROVED SIGNATURE Katy Coba, Director <i>(signature on file with DAS Business Services)</i>	

PURPOSE

This Procedure outlines the course of action that must be followed in order to implement Statewide Procurement Training Policy 107-009-0060.

APPLICABILITY

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

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

CHECKLISTS

- 1) [Am I a Contract Administrator?](#)
- 2) [Do I Conduct Procurements?](#)
- 3) [Do I Procure Goods or Services?](#)

DEFINITIONS

See Statewide Procurement Training Policy 107-009-0060 in addition to the following definitions. More capitalized terms are defined in OAR 125-246-0110.

Contact Hours: means:

- Successful completion of an Oregon Public Procurement Training. One Contact Hour is received for each one-hour of instruction with a status of pass, complete, or grade of 80% or better.
- Successful completion of Other Procurement Related Training or Education as follows:
 - a) Attending a procurement related training or an industry meeting, convention or event. Contact Hours are limited to seven hours per day. Session must be specific to procurement; have a

speaker, instructor, trainer, facilitator or moderator; and provide documented proof of attendance.

- b) Assisting in development or delivery of Learning Events. Contact Hours are unlimited, however only seven hours may be used as eligibility for a Certification or renewal of Certification within a given Certification cycle.

Training Validation: means the validation that Oregon Public Procurement Training meets eligibility requirements in order to count towards Certification Contact Hours. Eligibility requirements are:

- Training content must concur with the applicable OPBOK domain, duty and task.
- Training must include an assessment of some type, such as a test, exercise or required homework.
- The State Chief Procurement Officer must approve the training curriculum before delivery of the training and any use for Certification purposes.

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.

Other Procurement-related Training or Education: means completion of procurement-related training or education that meets the following eligibility requirements:

- Training must be completed within the most recent five years prior to the application date.
- Training must provide proof of attendance. Acceptable proof of attendance is a transcript, Certificate of attendance, Certificate of participation, or Certificate of completion that includes: applicant's name; title of the activity or event; date and location of the activity or event; name of the training or education provider; and the number of Contact Hours.

Procurement Experience: means experience that meets the following eligibility requirements:

- Full-time equivalent conducting Procurement for one or more Oregon Public Agencies. Current employment in Oregon public sector is not required at the time of application for Certification.
- Experience must be within the most recent 10 years prior to the application date, but does not have to be continuous.
- Experience must be documented in an official position description that includes: class title, description of the work performed in that class, distinguishing characteristics of the class, illustrative duties, knowledge, skills and abilities required to perform the work, employment standards for incumbents of positions in that class, required licenses and Certificates, and any necessary special requirements which must be met.

Test-out Option: means taking an assessment test instead of completing a course of instruction.

PROCEDURE

ORS 279A.159 PROCUREMENT TRAINING LAW

RESPONSIBILITY

STEP ACTION

Agency Staff

- 1 Reviews the above referenced checklists: 1) Am I a Contract Administrator? 2) Do I Conduct Procurements? and 3) Do I Procure Goods or Services?

Consults with Agency Manager to determine if any of the following ORS 279A.159 training is required for their position:

- [DAS PS - Contract Administration Training Certificate](#)
- [DAS PS - Principles of Public Procurement \(\\$10,000 - \\$150,000 or greater\)](#)
- [DAS PS - Fundamentals of Procurement \(\\$10,000 - \\$150,000\)](#)

Individuals with a current Oregon Procurement Basic Certification (OPBC) have satisfied the requirements of ORS 279A.159. Individuals with an expired or lapsed OPBC may Test-out of the requirement to take the class, and upon successfully passing the exam with a grade of 80% or higher will have satisfied the requirements of ORS 279A.159.

- 2 Registers for required courses in [iLearnOregon](#) and successfully completes all course requirements. If desired, prints a Certificate of completion provided in iLearnOregon.

PROCUREMENT CERTIFICATION PROGRAMS

RESPONSIBILITY

STEP ACTION

DAS Procurement Services (DAS PS)

- 1 Develops, implements and maintains the following Procurement Certification programs and requirements:

Oregon Procurement Basic Certification (OPBC) – valid five years from Certification date, requirements are:

- 1) At least one year of Procurement Experience;
- 2) No less than 75 Contact Hours of training or education within the most recent five years which includes:
 - a. Minimum 60 Contact Hours of Oregon Public Procurement Training;
 - b. 15 additional Contact Hours may be from any Other Procurement-related Training or Education.
- 3) Must pass the OPBC Certification exam. Unlimited exam retakes are available for a fee. Retakes must wait until next scheduled exam session.

OPBC renewal requirements: 25 Contact Hours of procurement-related education within the most recent five years, which must include the annual DAS PS rules update briefing, or equivalent. With exception of the DAS PS rules update briefing, continuing education Contact Hours may be from any approved source.

RESPONSIBILITY

STEP ACTION

Oregon Procurement Intermediate Certification (OPIC) – valid five years from Certification date, requirements are:

- 1) At least three years of Procurement Experience;
- 2) No less than 125 Contact Hours of training or education which includes:
 - a. Minimum 100 Contact Hours of Oregon Public Procurement Training; and
 - b. 25 additional Contact Hours may be from Other Procurement-related Training or Education.
- 3) Must pass the OPIC Certification exam. Unlimited exam retakes are available for a fee. Retakes must wait until next scheduled exam session.

OPIC renewal requirements: 50 Contact Hours of procurement-related education within the most recent five years, which must include the annual DAS PS rules update briefing, or equivalent. With exception of the DAS PS rules update briefing, continuing education Contact Hours may be from any approved source.

Oregon Procurement Advanced Certification (OPAC) – valid five years from Certification date, requirements are:

- 1) At least five years of Procurement Experience;
- 2) No less than 175 Contact Hours of training or education which includes:
 - a. Minimum 125 Contact Hours of Oregon Public Procurement Training;
 - b. 50 additional Contact Hours may be from Other Procurement-related Training or Education.
- 3) Must pass the OPAC Certification exam. Unlimited exam retakes are available for a fee. Retakes must wait until next scheduled exam session.

OPAC renewal requirements: 50 Contact Hours of procurement-related continuing education within the most recent five years, which must include the annual DAS PS rules update briefing, or equivalent. With exception of the DAS PS rules update briefing, continuing education Contact Hours may be from any approved source.

OPAC Certifications obtained under superseded policy 107-009-0060, dated 05/10/2010, remain in effect until expiration. At expiration, the Certificate must be renewed according to the standards outlined in this Procedure.

RESPONSIBILITY

STEP ACTION

Agency Staff

- 2 Identifies and completes Oregon Public Procurement Training courses needed to meet Contact Hour requirements for Certification.

Contact Hours credited towards one level of Certification can also be applied to a higher-level Certification.

To receive Contact Hours for Oregon Public Procurement Training not delivered by DAS PS, the training must meet Training Validation requirements.
- 3 Registers and successfully passes applicable Certification exam in [iLearnOregon](#), and pays the associated fee. Reviews iLearnOregon transcript to confirm exam status.
- 4 Submits application for Certification/recertification, uploads all required documentation through the [Oregon Procurement Certification webpage](#) and pays the associated fee.

NOTE: Individuals may check the status and expiration of existing Procurement credentials at any time through the [Procurement Services Credential Tracking](#) website.

DAS PS

- 5 Reviews Certification application and notifies requester of status.

ACCESSING DAS PS PROCUREMENT TRAINING

RESPONSIBILITY

STEP ACTION

DAS PS

- 1 Develops Learning Events that support the OPBOK and publishes the courses to the online [DAS PS training calendar](#) and in [iLearn Oregon](#). Fees for training are based on the published DAS rate schedule.

Agency Staff

- 2 Visits the online [DAS PS training calendar](#) to view current course offerings and registers for applicable courses in [iLearnOregon](#).

REQUESTING CONTACT HOURS FOR DEVELOPMENT OR DELIVERY OF LEARNING EVENTS

RESPONSIBILITY

STEP ACTION

Agency Staff

- 1 Submits a written request to the State Chief Procurement Officer for the award of Contact Hours for assisting in development or delivery of Learning Events.

Visits the [DAS PS Training website](#) to download the request form and get submission instructions.

RESPONSIBILITY**STEP ACTION**

State Chief Procurement Officer

- 2 Reviews and validates the number of Contact Hours for development or delivery of Learning Events. Confirms amount with requester.

REQUESTING A WAIVER OF CERTIFICATION REQUIREMENTS**RESPONSIBILITY****STEP ACTION**

Agency Staff

- 1 Submits an email to the State Chief Procurement Officer (egsps.training@oregon.gov) requesting a waiver of Certification requirements. Request must include:
- 1) The basis for the waiver request (e.g. education, training, experience or combination thereof); and
 - 2) The signature of a supervisory level person with first-hand knowledge of the requester's Procurement proficiency.

State Chief Procurement Officer

- 2 Determines to either approve or deny the Certification waiver request and notifies requester.

APPEALING A CERTIFICATION WAIVER DENIAL**RESPONSIBILITY****STEP ACTION**

Agency Staff

- 1 Submits an email appeal to the State Chief Procurement Officer (egsps.training@oregon.gov) for the Certification waiver denial within 20 business days from denial date.

State Chief Procurement Officer

- 2 Reviews Certification waiver appeal, makes final determination, and notifies requester.