



Oregon Procurement Advanced Certification Study Guide

Provided by DAS PS Training



Oregon Procurement Advanced Certification Study Guide

Getting Started

The **OPAC** certification program is designed to provide the Oregon Public Procurement Professional with the knowledge, skills and abilities necessary to conduct procurements with the following characteristics:

- Unlimited complexity
- Independently develops, negotiates and administers contracts with highly complex elements
- High risk: visibility, politically sensitive, or multiple factors
- In-depth analysis, problem spotting, unknowns, changes, and conflicts
- In-depth planning and coordinating

What is on the exam?

- Review the contents of this guide, starting with the Knowledge, Skill, and Ability (KSA) statement. These are from the Oregon Procurement Body of Knowledge (OPBoK) and are your key to “What do I need to know” for certification.
- The OPBoK serves as the outline for the content of the certification exams; the OPBoK also serves as an excellent guidance document for choosing appropriate education and exam preparation activities.
- OPBoK elements are categorized as to the certification level they relate to, for example; Basic, Intermediate and Advanced levels of certification.
- Certification exams will incorporate questions from lower certification levels in their make-up. For example, the Intermediate exam will include questions from the Basic level elements in the OPBoK. Similarly the Advanced exam will include questions from both the Basic and Intermediate level elements in the OPBoK.

Tips on taking the Test

- The first step in any preparation process is to first review the current OPBoK and assess personal areas of strength and weakness.
- Exam questions are designed to test you on the OPBoK as it relates to the role of a procurement professional.
- Exam questions are derived from the references that speak to the Knowledge, Skill, and Ability (KSA) statement from the OPBoK. This guide relies on 4 in particular:

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- ✓ Oregon Revised Statute (ORS)
 - ✓ Oregon Administrative Rule (OAR) – OAR 125 is the primary one
 - ✓ Oregon Procurement Manual (OPM)
 - ✓ DAS PS training
- Keep in mind that the certification test is based on a broad body of knowledge in the field of Oregon public procurement, representing a variety of positions within the profession. You may be an expert in your specific job role, but you should consider all other positions that are included in the profession when preparing for testing.
 - Approach the certification exam, respond to questions based on procurement practices as addressed in the references, and NOT respond to questions based on “how things are done” at your current government entity, which may or may not be in accordance with the stated reference material.
 - Try to study where you will not be distracted frequently.
 - Get a good night of sleep the night before the exam.
 - If you are ill – do not take the exam, ask to be rescheduled.
 - Remember:
 - ✓ Glasses
 - ✓ A watch
 - ✓ Turn OFF cell phones etc.

Using the Study Guide

The study guide breaks down each OPBoK element into the KSAs (Knowledge, Skill, and Ability), ORS, OAR Chapter 125, Oregon Procurement Manual (OPM), and training class that refer to the listed OPBoK element and form the basis for the exam questions. Essentially, this is what will be on the exam.

Taking the Test

- Read each question carefully
- Skip questions that puzzle you and move on – answer them at the end
- There is no one letter (a b c d) that is most often the right answer
- Your first pick of an answer is usually correct

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- Try to eliminate two answers as wrong first, then select the answer that is most true as the correct response from the remaining two
- Read every answer even if you think you have spotted the right answer at first glance!
- Use the rest of the test as a tool – there may be hints as to the correct answer someplace else in the test
- The test consist of 100 multiple-choice, True/False questions covering the certification level Knowledge, Skills and Abilities (KSA) identified in the Oregon Procurement Body of Knowledge (OPBoK).
- You will be afforded a total of 3.0 hours in which to complete the 100-question test.
 - ✓ Candidates who do not finish the exam in the allotted 3.0 hours will not be given a refund.
- For fill-in multiple choice, fill-in each answer choice to see which makes the statement true
- Passing is 80% correct (You can miss 20)

What to Bring to the Exam

- You are advised to limit the number of personal items brought into the center. You may, and are encouraged to bring:
 - ✓ Hydration
 - ✓ Snacks
 - ✓ Sweater or jacket, we don't have control over the room environment
- Everything necessary to complete the exam will be given to you at the exam

After the test

- Post-exam we will evaluate test taker scores to ensure the validity of each exam question. Questions which exceed a preset standard for error will be reviewed and a decision made whether to include the question in the final tabulation of results.
- Those who do not achieve a passing score will be notified of his/her score and will be given an opportunity to review their answers.

The test results are valid for five (5) years at which time you will be required to retake the exam in order to maintain valid exam result.

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Advanced OPBoK Element Study References

Knowledge, Skill, Ability	
01-01-02-02 Develop and implement a strategic sourcing process in your Agency	
01-09-03-01 Develop procurement strategies based on forecast data, market factors, and economic trends	
ORS	
279A.015 Policy	
279B.010 Policy	
279B.030 Demonstration that procurement will cost less than performing service with contracting agency's own personnel	
279.840 Purpose	
279B.110 Responsibility of bidders and proposers	
279C.305 Least-cost policy for public improvements; requirement to file list of planned projects and estimated costs and to identify projects contracting agency intends to complete with own personnel and resources; required analysis; exceptions	
200.015 Legislative findings	
OAR	
125-246-0170	Delegation of Authority
125-247-0010	Policies
125-247-0200	Buy Decision and Methods of Source Selection
OPM	
Learning Event	
DAS PS - Principles of Public Procurement IN CLASS	
Additional resources	
NASPO State and Local Government Procurement A Practical Guide Third Edition	
NASPO Fact Sheet: Strategic Sourcing	

Knowledge, Skill, Ability	
01-06-02-06 Design strategies to mitigate or avoid potential procurement risks and difficulties to include Payment and Performance Bond requirements	
ORS	
279A.010 Definitions for Public Contracting Code	
279A.157 State contracting agency use of contract form, contract template or solicitation template; exceptions and exemptions; rules	
279C.335 Competitive bidding; exceptions; exemptions.	
279C.525 Provisions concerning environmental and natural resources laws; remedies	

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279C.560 Form of retainage; procedures for holding and payment
279A.025 Application of Public Contracting Code
279B.020 Maximum hours of labor on public contracts; holidays; exceptions; liability to workers; rules
279B.400 Protests and judicial review of approvals of special procurements.
279B.405 Protests and judicial review of solicitations
279B.415 Judicial review of protests of contract award.
279B.420 Judicial review of other violations.
279C.320 Contracts for construction other than public improvements.
279C.335 Competitive bidding; exceptions; exemptions.
279C.365 Requirements for solicitation documents, bids, and proposals.
279C.375 Award and execution of contract; determination of responsibility of bidder; bonds; impermissible exclusions
279C.380 Performance bond; payment bond; waiver of bonds
279C.385 Return or retention of bid security
279C.390 Exemption of contracts from bid security and bonds
279C.400 Competitive proposals; procedure
79C.470 Compensation for contractor on contract declared void by court; exceptions; applicability
279C.560 Form of retainage; procedures for holding and payment.
279C.580 Contractor's relations with subcontractors
279C.585 Authority to substitute undisclosed first-tier subcontractor; circumstances; rules
279C.600 Right of action on payment bond or public works bond of contractor or subcontractor; notice of claim
279C.605 Notice of claim
279C.610 Action on contractor's public works bond or payment bond; time limitation
279C.625 Joint liability when payment bond not executed
279C.810 Exemptions; rules
279C.830 Provisions concerning prevailing rate of wage in specifications, contracts and subcontracts; applicability of prevailing wage; bond
279C.836 Public works bond; rules
279C.855 Liability for violations
279C.870 Civil action to enforce payment of prevailing rates of wage.
OAR
125-246-0110 Definitions
125-246-0140 Procurement Authority
125-246-0333 Independent Contractors
125-246-0350 Approval of Personal Services Contracts
125-246-0351 Acquiring Services before Obtaining Requisite Approvals of a Personal Services Contract
137-045-0015 Legal Sufficiency Approval
137-045-0035 Review of Anticipated Public Contract
137-045-0050 Exemptions from Legal Sufficiency Approval Based on Risk Assessment
137-045-0055 Special Public Contract Exemption Program for Exemptions from Legal Sufficiency Approval Based on Risk Assessment

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137-045-0060	Class Exemptions Based on Attorney General's Pre-Approval
137-045-0070	Emergency Public Contract Exemption
137-045-0080	Authorization of Services Prior to Legal Sufficiency Approval
137-046-0140	Solicitation Document Templates; Contract Forms and Contract Templates; Accountability for Advice
137-047-0330	Electronic Procurement
125-246-0170	Delegation of Authority
125-246-0350	Approval of Personal Services Contracts
125-247-0280	Emergency Procurements
OPM	
State of Oregon: Oregon procurement manual - Conduct market research	
Learning Event	
DAS PS - Principles of Public Procurement IN CLASS	
DAS PS - Fundamentals of Procurement (\$10,000 to \$150,000) IN CLASS	
Additional resources	
State of Oregon Risk Management	

Knowledge, Skill, Ability
01-09-04-01 Analyze contract spend (actual activity) and project future spend patterns by service or commodity areas.
ORS
279C.110 Selection procedure for consultants to provide services; compensation; applicability
279C.527 Inclusion of amount for green energy technology or woody biomass energy technology in public improvement contract; written determination of appropriateness; exemptions and limitations.
279C.528 State Department of Energy requirements and specifications; record keeping requirements; rules
279C.655 Extension and compensation when work suspended.
279B.030 Demonstration that procurement will cost less than performing service with contracting agency's own personnel and resources or that performing service is not feasible; exemptions; analysis for procurement related to information technology; rules
279B.033 Contents of cost analysis; conditions under which procurement may proceed; exceptions
279B.036 Determination of feasibility of procurement.
279C.305 Least-cost policy for public improvements; requirement to file list of planned projects and estimated costs and to identify projects contracting agency intends to complete with own personnel and resources; required analysis; exceptions
279C.305 Least-cost policy for public improvements; requirement to file list of planned projects and estimated costs and to identify projects contracting agency intends to complete with own personnel and resources; required analysis; exceptions
279C.335 Competitive bidding; exceptions; exemptions

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OAR	
125-246-0170	Delegation of Authority
125-246-0210	Subcontracting to and Contracting with Emerging Small Businesses; Disqualification
137-048-0220	Formal Selection Procedure
137-048-0250	Solicitation Cancellation, Delay or Suspension; Rejection of All Proposals or Responses; Consultant Responsibility For Costs
137-047-0250	Source Selection
125-246-0170	Delegation of Authority
125-247-0110	Feasibility Determination, Cost Analysis and Department Report
125-247-0170	Life Cycle Costing
125-247-0185	Approval of Information Technology or Telecommunications Procurements
OPM	
State of Oregon: Oregon procurement manual - Conduct market research	
Learning Event	
DAS PS - Principles of Public Procurement WEBINAR	
DAS PS - Principles of Public Procurement IN CLASS	
DAS PS - Fundamentals of Procurement (\$10,000 to \$150,000) IN CLASS	
DAS PS - Fundamentals of Procurement (\$10,000 to \$150,000) WEBINAR	
Additional resources	

Knowledge, Skill, Ability
02-01-07-01 Create and publish a solicitation for construction services other than public improvements such as Emergency work, Minor alteration or ordinary repair or maintenance necessary to preserve a public improvement
ORS
279A.010 Definitions for Public Contracting Code
279A.020 Organization of Public Contracting Code
279A.025 Application of Public Contracting Code
279A.050 Procurement authority
279A.065 Model rules generally; applicability to contracting agencies
279A.128 Preference for goods fabricated or processed within state or services performed within state
279B.080 Emergency procurements
279B.130 Debarment of prospective bidders and proposers
279C.100 Definitions for ORS 279C.100 to 279C.125

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279C.305 Least-cost policy for public improvements; requirement to file list of planned projects and estimated costs and to identify projects contracting agency intends to complete with own personnel and resources; required analysis; exceptions.	
279C.307 Limitations in procurement of personal services; exception.	
279C.320 Contracts for construction other than public improvements	
279C.332 Definitions for ORS 279A.065, 279C.307, 279C.335, 279C.337 and 279C.380	
279C.335 Competitive bidding; exceptions; exemptions	
279C.337 Procurement of constructions manager/general contractor services	
279C.355 Evaluation of public improvement projects not contracted by competitive bidding	
279C.370 First-tier subcontractor disclosure	
279C.375 Award and execution of contract; determination of responsibility of bidder; bonds; impermissible exclusions	
279C.380 Performance bond; payment bond; waiver of bonds.	
279C.400 Competitive proposals; procedure.	
279C.440 Disqualification from consideration for award of contracts	
279C.460 Action by or on behalf of adversely affected bidder or proposer; exception for personal services contract	
279C.465 Action against successful bidder; amount of damages; when action to be commenced; defenses.	
279C.525 Provisions concerning environmental and natural resources laws; remedies	
279C.527 Inclusion of amount for green energy technology or woody biomass energy technology in public improvement contract; written determination of appropriateness; exemptions and limitations.	
279C.534 Advisory committee for monitoring implementation of apprenticeship condition in public improvement contracts	
279C.535 Condition concerning steel material; rules.	
279C.580 Contractor's relations with subcontractors.	
279C.585 Authority to substitute undisclosed first-tier subcontractor; circumstances; rules	
279C.590 Complaint process for substitutions of subcontractors; civil penalties	
279C.800 Definitions for ORS 279C.800 to 279C.870	
279C.805 Policy	
279C.810 Exemptions; rules	
279C.830 Provisions concerning prevailing rate of wage in specifications, contracts and subcontracts; applicability of prevailing wage; bond.	
279C.836 Public works bond; rules	
OAR	
125-246-0100	Application; Commentary; Federal Law Prevails
125-246-0110	Definitions
125-247-0280	Emergency Procurements
125-248-0330	Special Contract Processes
125-249-0100	Application; Federal Override; Effective Date
125-249-0140	Contracts for Construction Other Than Public Improvement
125-249-0145	Contracts for Oversight of Public Contracts

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125-249-0630	Findings, Notice and Hearing
125-249-0690	Construction Manager/General Contractor (CM/GC)
137-049-0690	Construction Manager/General Contractor Services (“CM/GC Services”)
OPM	
State of Oregon: Oregon procurement manual - Public Improvement ...	
State of Oregon: Oregon procurement manual - Public works	
State of Oregon: Oregon procurement manual - Emergency Procurement	
State of Oregon: Oregon procurement manual - Change orders	
Learning Event	
DAS PS - Principles of Public Procurement WEBINAR	
DAS PS - Principles of Public Procurement IN CLASS	
DAS PS - Fundamentals of Procurement (\$10,000 to \$150,000) IN CLASS	
DAS PS - Fundamentals of Procurement (\$10,000 to \$150,000) WEBINAR	
Additional resources	

Knowledge, Skill, Ability	
02-01-08-01 Create and publish a solicitation for Construction Manager/General Contractor Services (“CM/GC Services”)	
ORS	
279A.065 Model rules generally; applicability to contracting agencies.	
279C.307 Limitations in procurement of personal services; exception	
279C.332 Definitions for ORS 279A.065, 279C.307, 279C.335, 279C.337 and 279C.380	
279C.335 Competitive bidding; exceptions; exemptions.	
279C.337 Procurement of constructions manager/general contractor services	
279C.380 Performance bond; payment bond; waiver of bonds	
OAR	
125-249-0145	Contracts for Oversight of Public Contracts
125-249-0630	Findings, Notice and Hearing
125-249-0690	Construction Manager/General Contractor (CM/GC)
137-049-0690	Construction Manager/General Contractor Services (“CM/GC Services”)
OPM	
State of Oregon: Oregon procurement manual - Alternative Contracting method	
State of Oregon: Oregon procurement manual - Public works	

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Learning Event
DAS PS - Principles of Public Procurement WEBINAR
DAS PS - Principles of Public Procurement IN CLASS
DAS PS - Fundamentals of Procurement (\$10,000 to \$150,000) IN CLASS
DAS PS - Fundamentals of Procurement (\$10,000 to \$150,000) WEBINAR
Additional resources

Knowledge, Skill, Ability	
02-01-09-01 Create and publish a Design-Build Solicitation	
ORS	
279A.010 Definitions for Public Contracting Code	
279C.307 Limitations in procurement of personal services; exception	
279C.332 Definitions for ORS 279A.065, 279C.307, 279C.335, 279C.337 and 279C.380	
279C.380 Performance bond; payment bond; waiver of bonds	
OAR	
125-246-0110	Definitions
125-248-0330	Special Contract Processes
125-249-0145	Contracts for Oversight of Public Contracts
125-249-0630	Findings, Notice and Hearing
125-249-0670	Design-Build Contracts
OPM	
State of Oregon: Oregon procurement manual - Public Improvement - Alternative Contracting method	
State of Oregon: Oregon procurement manual - Architectural and Engineering Procurement	
Learning Event	
Additional resources	

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Knowledge, Skill, Ability	
02-01-11-01 Conduct Multiple-Tiered and Multistep Solicitations	
ORS	
279B.060 Competitive sealed proposals.	
279C.405 Requests for information, interest or qualifications; requirements for requests for proposals.	
279C.410 Receipt of proposals; evaluation and award	
OAR	
125-248-0330	Special Contract Processes
125-249-0145	Contracts for Oversight of Public Contracts
125-249-0630	Findings, Notice and Hearing
125-249-0670	Design-Build Contracts
125-246-0110	Definitions
125-247-0430	Addenda to Solicitation Document
125-247-0720	Protests and Judicial Review of Multiple-Tiered and Multistep Solicitations
OPM	
State of Oregon: Oregon procurement manual - Terms and definitions	
Learning Event	
DAS PS - Principles of Public Procurement WEBINAR	
DAS PS - Principles of Public Procurement IN CLASS	
DAS PS - Fundamentals of Procurement (\$10,000 to \$150,000) IN CLASS	
DAS PS - Fundamentals of Procurement (\$10,000 to \$150,000) WEBINAR	
Additional resources	

Knowledge, Skill, Ability	
03-02-03-02 Institute appropriate remedies when an issue is identified.	
03-02-07-05 Compose documents designed to correct actions and/or respond to issues.	
03-02-07-04 Translate legal advice into actions and solutions to correct a contractor executing a public contract.	
ORS	
279A.110 Discrimination in subcontracting prohibited; remedies	
279A.107 Certification as disadvantaged business enterprise, minority-owned business, woman-owned business, business that service-disabled veteran owns or emerging small business during term of public contract; exceptions.	

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279B.400 Protests and judicial review of approvals of special procurements	
279B.405 Protests and judicial review of solicitations.	
279B.420 Judicial review of other violations	
279B.425 Review of prequalification and debarment decisions	
279C.525 Provisions concerning environmental and natural resources laws; remedies	
279C.306 Administrative enforcement of least-cost policy for public improvements; procedure; civil action	
279C.450 Appeal procedure for decision to deny, revoke or revise prequalification; hearing; costs; judicial review	
279C.525 Provisions concerning environmental and natural resources laws; remedies	
279C.580 Contractor's relations with subcontractors	
OAR	
125-246-0314	Disabled Veterans Preference
125-246-0322	Preference for Recycled Materials
125-247-0010	Policies
125-247-0730	Protests and Judicial Review of Solicitations
125-246-0900	Penalties
125-246-0110	Definitions
125-248-0100	Application
125-248-0300	Contract Form; Prohibited Payment Methodology; Purchase Restrictions
125-246-0100	Application; Commentary; Federal Law Prevails
125-246-0110	Definitions
125-246-0170	Delegation of Authority
125-246-0210	Subcontracting to and Contracting with Emerging Small Businesses; Disqualification
125-246-0220	Governor's Policy Advisor for Economic and Business Equity
125-246-0350	Approval of Personal Services Contracts
125-246-0351	Acquiring Services before Obtaining Requisite Approvals of a Personal Services Contract
125-246-0360	Purchases Through Federal Programs
125-246-0365	ORS 190 Agreements (Intergovernmental)
125-246-0570	Reinstatement of Expired Contract; Retroactive Approval of Existing Contract
125-246-0900	Penalties
125-247-0010	Policies
125-247-0110	Feasibility Determination, Cost Analysis and Department Report
125-247-0270	Intermediate Procurements
125-247-0275	Sole-Source Procurements
125-247-0287	Special Procurements; Request Procedures
125-247-0288	Special Procurements; by Rule
125-247-0295	Special Procurements: General or Special Counsel Authorized by the Attorney General

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125-247-0691	Brand Name or Equal Specification
125-247-0805	Amendments to Contracts and Price Agreements
125-248-0100	Application
125-248-0300	Contract Form; Prohibited Payment Methodology; Purchase Restrictions
125-249-0630	Findings, Notice and Hearing
OPM	
State of Oregon: Oregon procurement manual - Contract administration	
State of Oregon: Oregon procurement manual - Programs for business inclusion and diversity	
Learning Event	
DAS PS - Principles of Public Procurement WEBINAR	
DAS PS - Principles of Public Procurement IN CLASS	
DAS PS - Fundamentals of Procurement (\$10,000 to \$150,000) IN CLASS	
DAS PS - Fundamentals of Procurement (\$10,000 to \$150,000) WEBINAR	
Additional resources	

Knowledge, Skill, Ability
03-02-08-01 Interpret the contract terms and conditions to terminate a contract.
03-02-08-03 Compose appropriate documentation to successfully terminate a public contract.
ORS
279A.107 Certification as disadvantaged business enterprise, minority-owned business, woman-owned business, business that service-disabled veteran owns or emerging small business during term of public contract; exceptions
279A.110 Discrimination in subcontracting prohibited; remedies
279A.260 Powers and duties of department; acquisitions by qualified donees; rules
279B.045 Contractor warranty and covenant concerning tax law compliance
279B.140 Price agreements
279B.235 Condition concerning hours of labor; compliance with pay equity provisions; employee discussions of rate of pay or benefits
279C.660 Compensation when contract terminated due to public interest
279C.665 Contractual provisions for compensation when contract terminated due to public interest
279C.110 Selection procedure for consultants to provide services; compensation; applicability
279C.340 Contract negotiations.
279C.410 Receipt of proposals; evaluation and award
279C.470 Compensation for contractor on contract declared void by court; exceptions; applicability

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279C.520 Condition concerning hours of labor; compliance with pay equity provisions; employee discussions of rate of pay or benefits	
279C.525 Provisions concerning environmental and natural resources laws; remedies	
279C.655 Extension and compensation when work suspended	
279C.660 Compensation when contract terminated due to public interest	
279C.665 Contractual provisions for compensation when contract terminated due to public interest	
279.853 Conditions required in contract for services with successor qualified nonprofit agency for individuals with disabilities	
OAR	
125-246-0110	Definitions
125-246-0314	Disabled Veterans Preference
125-246-0330	Supplier Requirements
125-246-0570	Reinstatement of Expired Contract; Retroactive Approval of Existing Contract
125-248-0310	Expired or Terminated Contracts; Reinstatement
OPM	
State of Oregon: Oregon procurement manual - Oregon.gov	
State of Oregon: Oregon procurement manual - Oregon.gov	
State of Oregon: Oregon procurement manual - Oregon.gov	
Learning Event	
DAS PS - Principles of Public Procurement WEBINAR	
DAS PS - Principles of Public Procurement IN CLASS	
DAS PS - Fundamentals of Procurement (\$10,000 to \$150,000) IN CLASS	
DAS PS - Fundamentals of Procurement (\$10,000 to \$150,000) WEBINAR	
Additional resources	