

Procurement Reform Purchasing and Procurement Training Project Update

*Financial Management Advisory Council
(FMAC)*

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Washington State Department of
Enterprise Services

Project Purpose and Vision

- The purpose of the **Procurement Training Project** is to develop and implement the curriculum, policy, registration and reporting mechanisms; and necessary supporting technology; if any, to meet the legislative mandates as described in RCWs 39.26.110.
- The project is broken out into smaller projects: Initial Training Phase, Training Program Development Phase, **Foundation Phase**, and to be determined Future Phase(s).
- The vision of the current Foundation Phase is to meet the legislative mandate by enabling state agency employees who are responsible for ***developing, executing, or managing procurements or contracts, or both***, to complete Department approved training by July 1, 2015.



Legislation – RCW 39.26.110

RCW 39.26.110, Training, states:

- The department must provide expertise and training on best practices for state procurement.
- The department must establish either training or certification programs, or both, to ensure consistency in procurement practices for employees authorized to perform procurement functions under the provisions of this chapter. When establishing training or certification programs, the department may approve existing training or certification programs at state agencies. When establishing programs or approving existing programs, the department shall work with agencies with existing training programs to ensure coordination and minimize additional costs associated with training requirements.
- **Beginning July 1, 2013, state agencies must require agency employees responsible for developing, executing, or managing procurements or contracts, or both, to complete department-approved training or certification programs, or both. Beginning July 1, 2015, no agency employee may execute or manage contracts unless the employee has met the training or certification requirements or both as set by the department.** Any request for exception to this requirement must be submitted to the director for approval before the employee or group of employees executes or manages contracts.



Project Organization Structure

Lynne McGuire
Executive Sponsor

Farrell Presnell
Project Sponser

Lori McCleary
Procurement Reform Project
Manager

Keith Kawamura
Business Process & Design
Manager

Cheryl Shaw
Procurement Training
Manager

Melanie Buechel
Procurement Subject Matter
Expert & Trainer

Training Advisory Group (TAG)
Procurement SMEs – State Agencies & Higher
Ed

**DES Learning
Management System**
Training Host

Public Knowledge
Training and Curriculum
Consultants

DES Communications



Project Phases at a Glance

2012-2013

- 1 - Preliminary Planning and Visioning

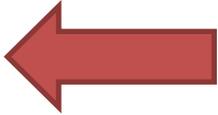
06/2013 –
07/2014

- 2- Initial Training Phase (Meet Immediate Need)

11/2013 –
6/2014

- 3- Training Program Development Phase

06/2014 –
04/2015

- 4- Foundation Phase  **We are here!!**

Post 07/2015

- 5- Future Phase(s) – Expansion on Core Training



Evolution – Preliminary Planning

Procurement Reform Workgroup

One of 18 Different Work Groups Established to Address Procurement Reform Legislation

Group formed May 2012

Recommendations Submitted by Group September 2012

TAG Formation

Representatives from 18 Washington agencies and HE

March 2013

Training Development & Implementation

Vendor - Public Knowledge Engaged November 2013

Hired Procurement Training Manager October 2014



Initial Training

Sole Source / Emergency Contracts / Direct Buy

Class designed for personnel who develop, manage, execute and/or file Sole Source, Emergency or conduct Direct Buy

Agency Contract Reporting

Contract Reporting Training for the initial pilot group and two opt-in phases.

Procurement 101

Interim training covering overview of procurement requirements under chapter 39.26 RCW – Procurement of Goods and Services



Training Program Development Phase

Project Vision

Washington's Procurement Training and Certification Program ensures that state procurement professionals, contract managers and executive management have the knowledge, skills and abilities to procure goods and services to support the business of state government.

The Program will:

- Be adequately funded
- Communicate training and certification requirements for specific jobs
- Emphasize critical thinking skills and innovation
- Provide cost-effective and accessible training
- Provide creative and innovative courses
- Address adult learning styles
- Provide course materials that are easy to access and update
- Implement clear and transparent evaluation and testing processes
- Be sustainable and maintained over time
- Enable agencies to receive appropriate delegation of authority



Training Program Foundation Phase and Course Development Process

Parameters

Learning Objectives

Scope of Training

Template/Format

DES Standard Look
& Feel
Addresses:
Readability
ADA

Course Content & Materials

Presentation (PPT)

Workbook or
Resource Guide

Instructor
Orientation Guide

Facilitator Guide

eLearning

Assessment

Evaluation

Course Evaluation
Form

Lessons Learned
and
Refinements
TAG



Foundation Courses

Purchasing and Procurement 101

Four 2-hour modules

General purchasing and procurement information

Roles and responsibilities

Types of Procurements

Procurement options and processes

Delegated Authority

Purchasing processes

Resources

Scope vs. statement of work

Strategic alignment

Components of contracts

Contract Management 101

Four 2-hour modules

*Purchasing and Procurement 101 Lite (Separate 1.5 hour module)

Risk Assessment and Risk Management

Contract Management and Monitoring

Collaboration and Partnership

Contract Disputes and Remedies

Communication with Contractors

Employee vs. Contractor

Other Foundation Courses (Phase 2)

Small Acquisitions

Executive Management

Procurement Ethics

WEBS*

Client Service Contracts*

Foundation Phase

Delivery Methods

Instructor-Led Webinars

eLearning

Instructor-Led

Train the Trainer (TT)

Learning Management System

Registration

Employee Training Profile Information

Testing

Reporting

Initial Course Roll Out

Purchasing and Procurement 101 – Instructor Led Webinar, eLearning

Contract Management 101 – Instructor Led Webinar, eLearning

Ethics and Procurements-eLearning

Small Acquisitions-Instructor-Led Webinar, eLearning, TT

Executive Management-eLearning , other



Required Attendees

Broken Down by Typical Work/Tasks

Procurement Professionals

Purchasing/Procurement Coordination

Supply Chain Management

Advises on procurement law/policy/procedures

Develops procurement documents and contracts

Develops specifications

Vendor cures and terminations

Negotiations

Manages procurement risks

Filing and Reporting

Partners with and advises contract managers

Contract Managers

Initiate procurement need

Develops deliverables and specifications

Ensures budget resources

Partner with Contract office to ensure compliance

Negotiations

Manage risk and Monitor contracts

Communicate with Contractor

Provide technical assistance to Contractors

Executive Management

Ensures Agency compliance with procurement laws/policies and procedures

Authorizes procurement

Requests additional delegated authority and exemptions

Executes contracts or delegates authority

Sometimes manage contracts or participates in procurement activities

Small Purchasers

Conducts small procurement from Master Contacts

P-Card purchases w/in limits of authority

Conducts low risk direct buys

Supplies inventory and stockrooms – office



Staff to Course Matrix

Core Training

Procurement Professional	Contract Manager	Executive Management	Small Purchasers
Procurement Ethics	Procurement Ethics	Procurement Ethics	Procurement Ethics
Purchasing and Procurement 101	Contract Management 101	Executive Management Purchasing and Procurement	Small Acquisitions



Anticipated Future Offerings

IT Academy

Rules, Regulations
and Best Practices

Competitive
Procurement

Negotiations

Terms and
Conditions

Evaluation
Strategies and
Methodologies

Small and Diverse
Business Outreach

Contract
Termination

Use of Master
Contracts

Performance Based
Contracting

Writing Statements
of Work

Client Service
Contracts

Specialized Training
for Finance, SAO,
AGO

More to be
determined by DES,
TAG and other
Stakeholders

Certification for
Procurement
Professionals



Where Are We Today

*We have 9000+ people to train between now
and 7/1/2015!!!*



*Cheryl Shaw, DES Procurement Training
Manager*



Thank you

Questions?

