

## OVERVIEW

Procurement professionals play an integral role in all Public Agencies by providing oversight and support of the purchasing process, and assuring that the Agency follows all Public policies, rules, and regulations. The procurement professional also serves as a representative of the Public, and is responsible for safeguarding the Public from unethical behaviors related to purchasing.

The State of Idaho's Division of Purchasing has developed a professional development curriculum for State procurement professionals to help elevate the capabilities of its procurement services. The goals of the program are to enhance the current abilities of all procurement professionals, improve confidence in their roles during the procurement processes, improve consistency of applied policies and procedures, and to become more effective leaders during the purchasing and procurement process.

## MODULES

This professional development program is broken down into four modules:

- **Module A (Procurement 101)** – Understanding core procurement fundamentals is the foundation for procurement professionals. This model will expose individuals to core procurement fundamentals, review ethical requirements of the purchasing agent, provide an overview of the most common types of procurement solicitations with the State, and review tools and templates that are available to the purchasing agent. This module serves as the foundation to the concepts, tools, and practices introduced in subsequent modules.
- **Module B (The RFQ Solicitation)** – Reviews the principles and fundamentals for preparing a successful RFQ solicitation.
- **Module C (The ITB Solicitation)** – Reviews the principles and fundamentals for preparing a successful ITB solicitation.
- **Module D (The RFP Solicitation)** – Reviews the principles and fundamentals for preparing a successful RFP solicitation, including the scope of work, criteria and weights, administrative procedures, and submittal forms. Provides a step-by-step process of preparing, issuing, and administering an RFP, including advertising, receiving proposals, educating the evaluation committee, compiling results, administering the interview period, pre-contract negotiation and clarification, and debriefing procedures.

# CERTIFICATION PROGRAM

The Division of Purchasing Idaho Certified Public Buyer (ICPB) Program has 3 levels as shown below:

CERTIFICATION	REQUIREMENTS	RE-CERTIFICATION REQUIREMENTS
ICPB (Level 1-RFQ)	<ul style="list-style-type: none"><li>&gt; Complete Modules A and B</li><li>&gt; Certify DOP Code of Ethics</li><li>&gt; 80% on Procurement 101/RFQ Exam</li><li>&gt; RFQ Practical</li><li>&gt; 1 year experience in public procurement, with at least 6 months with the State of Idaho.</li></ul>	<ul style="list-style-type: none"><li>- Every 2 years</li><li>- Attend 2 DOP Quarterly Workshops per year</li><li>- 20 hours of new CECs</li><li>- Ethics refresher</li></ul>
ICPB (Level 2-ITB)	<ul style="list-style-type: none"><li>&gt; Complete Module C</li><li>&gt; 80% on ITB Exam</li><li>&gt; ITB Practical</li></ul>	TBD
ICPB (Level 3-RFP)	<ul style="list-style-type: none"><li>&gt; Complete Module D</li><li>&gt; 80% on RFP Exam</li><li>&gt; RFP Practical</li></ul>	TBD

## REGISTRATION & QUESTIONS

For any questions about this program, or to register for the State's Certification program, please email the contact listed below:

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# COURSE SYLLABUS

## Module A – Procurement 101

### COURSE DESCRIPTION & LEARNING OBJECTIVES

This Module exposes professionals to core procurement principles, procurement fundamentals, and introduces the most common types of procurement solicitations that are utilized in the State of Idaho. It is targeted for individuals with limited experience in the public procurement field, or for procurement professionals that are new to the State of Idaho. The learning objectives of this module include:

1. Identify and understand core public procurement fundamentals
2. Identify critical ethical policies that apply to procurements
3. Understand the primary differences between different types of procurement solicitations

### CLASS SCHEDULE

FUNDAMENTALS OF PROCUREMENT	
Class A1 – Introduction & Procurement Overview	3 Mins
Class A2 – Core Procurement Fundamentals	15 Mins
Class A3 – Responsibilities of the Purchasing Agent	15 Mins
Class A4 – Ethics	76 Mins
Class A5a – State Contracts and Spending Limits	Self Pace
A5b – Statewide Contracts	13 Mins
Class A6a – Exemptions Overview	2 Mins
A6b – Exemptions from Open Contracts	18 Mins
A6c – Exemptions from Level of Authority	9 Mins
A6d – Exemptions from Open Competition	51 Mins
A6e – Sole Source Awards	25 Mins
Class A7 – Using IPRO	26 Mins

FUNDAMENTALS OF SOLICITATIONS	
Class A8 – Overview of Idaho Solicitations (RFQ, ITB, RFP)	22 Mins
Class A9 – Initial Questions To Ask	13 Mins
Class A10 – Things To Consider	60 Mins
Class A11 – Applying Preferences	38 Mins
Class A12 – Contract Administration	55 Mins

## DEVELOPING THE SCOPE OF WORK

Class A13a – Introduction of Specs and Scope of Work (SOW)	50 Mins
Class A13b – Writing Specifications and SOW	9 Mins

# COURSE SYLLABUS

## Module B – The RFQ Solicitation

### COURSE DESCRIPTION & LEARNING OBJECTIVES

This Module provides an overview of the Request for Quote (RFQ) solicitation as utilized by the State of Idaho. The learning objectives of this module include:

1. Understand the critical elements of an RFQ
2. Understand the administrative procedures required by an RFQ
3. Understand how to download the RFQ template and how to create an RFQ

### CLASS SCHEDULE

#### FUNDAMENTALS OF PROCUREMENT

Class B1 – Introduction	1 Min
Class B2 – Getting Started with the RFQ - The RFP Questionnaire	26 Min
Class B3 – Administration of the RFQ	40 Min
Class B4 – The RFQ Template Document	20 Min
Class B5 – Walking Through the RFQ in IPRO	35 Min
Class B6 – RFQ & IPRO	Self Pace