



John S. Richard
Director

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Governor

STATE OF OKLAHOMA
DEPARTMENT OF CENTRAL SERVICES

PROCUREMENT INFORMATION MEMORANDUM 99-07

TO: All Certified Procurement Officers

REVISION DATE: September 10, 2009

SUBJECT: Role of the Contracting Officer

The Central Purchasing Act (74 O.S., Section 85.5.D) establishes the requirements for training and certification of state purchasing personnel.

Those who have completed the prescribed course of training and who have successfully completed the subsequent examination are eligible for designation as Certified Procurement Officer (CPO).

The attached information provides further guidance and function of a CPO. You are encouraged to review the attachments and use these guidelines in fulfilling the role of a purchasing professional within your organization.

Point of Contact for this memorandum is Keith Gentry, CPO, Contracts Manager Phone: 405-522-4878
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A handwritten signature in black ink, appearing to read "Scott Schlotthauer".

Scott Schlotthauer
State Purchasing Director

Attachments:

1. Certified Procurement Officer
2. Roles of the agency CPO

"SERVICE, QUALITY, INTEGRITY"

CERTIFIED PROCUREMENT OFFICER

SOURCE

74 O.S. Section 85.5.D states: "The State Purchasing Director shall provide training for state agency purchasing officials and other purchasing staff. The training shall include principles of state procurement practices, basic contracting, provisions of the Oklahoma Central Purchasing Act, rules promulgated pursuant to the Oklahoma Central Act, provisions of the Section 3001 et seq. of this title, which relate to the State Use Committee, and any other matters related to state procurement practices. State Agency purchasing Officials that demonstrate proficiency shall be certified as "Certified Procurement Officers" or "Certified Procurement Analysts" by the State Purchasing Director and shall be authorized to make acquisitions pursuant to provisions of the Oklahoma Central Purchasing Act and rules authorized by this section."

REQUIREMENTS

As stated above, the Certified Procurement Officer (CPO) must complete formal training provided by Central Purchasing and demonstrate proficiency by successfully completing the requisite examination jointly developed by the Office of Personnel Management and the Central Purchasing Division and administered by OPM. Upon achieving this certification, CPO's are then eligible to procure products/services for their agency. State agencies with approved internal purchasing procedures and a CPO may affect purchases not exceeding \$50,000.00. CPO's are encouraged to continue efforts to expand their knowledge and understanding of the complex field of public procurement through Continuing Professional Education (CPE) programs. CPE is required to continue and renew certification.

EXPECTED SKILL SETS/PHASES OF CPO MASTERY IN PUBLIC PROCUREMENT

Pre Solicitation Phase of Procurement

- Planning Market survey/research
- Need Assessments Internal development of need (product/service) and defining procurement source(s)
- Determination Selecting method of procurement and establishing timelines
- Documentation Ensure file is adequately and appropriately documented

Solicitation and Award Phase of Procurement

- Preparation Development of solicitation documents and vendor listing
- Management Administration of procurement process
- Receipt Receipt of vendor offers
- Pre Evaluation Determination of vendor responsiveness and responsibility
- Evaluation/Award Evaluation, award and/or recommendation of award
- Documentation Ensure file is adequately and appropriately documented

Post Award Phase of Procurement (Contract Administration)

- Planning To provide for effective Contract Administration and accomplish planning and scheduling necessary to provide Contract Administration
- Coordination As appropriate, schedule and conduct Contractor/agency meeting to assure production and delivery of products/services (more often required in services contract or extensive supply contracts).
- Monitor Monitor contract progress to assure performance
- Overview Though not directly involved with, must be aware of receipt, inspection and acceptance of deliverables
- Evaluation Performance evaluation and problem resolution as necessary
- Payment Though not directly involved with, must be aware of payment for deliverables
- Closure Accomplish contract close out, ensuring that necessary actions and file documentation has been completed.

ROLES OF THE AGENCY CPO

Buys Within Agency Authority	Buys Exceeding Agency Authority
Planning in conjunction with agency division, defining need and procurement source(s)	Same.
Preparation of solicitation documents to include statement of work, specifications and other essential procurement information.	Same.
Purchasing authority for solicitation and receipt of offers	Central point of contact and link to Central Purchasing
Team leader for establishing Evaluation Committee and/or ensuring evaluation of offers.	Same.
Review of evaluation committee recommendation and subsequent award of contract.	Liaison with Central Purchasing on award recommendation.
Award of contract.	Recommendation to Central Purchasing.
Team leader or member of agency contract administration team. Team includes CPO and technical/program staff. Includes monitor of performance, problem resolution, awareness of receipt, inspection and acceptance of deliverables. Awareness of payment and timeliness.	Member of contract administration team. Team includes Central Purchasing Contracting Officer, agency CPO, and agency technical/program staff.
Contract close-out and final file notes.	Same.