

State Procurement Office Training Curricula		Level 1: Appointed/Exempt Department Heads, Deputy Directors, Executive Directors, Heads of Attached Agencies	Level 2: Procurement Officer by CPO delegation or serves as a final approver of procurement for all dollar amounts and source selection methods. (Exemptions incl.)	Level 3: High Level Procurement Positions (Responsibilities includes more than 50% of procurement approves/reviews/performs procurements \$50,000 or more)	Level 4: Mid-Level Procurement Positions (Responsibilities includes between 15% to 50% of procurement duties and may approves/reviews / perform procurements for all dollar amounts)	Level 5: Non-Procurement Position (Position description does not include procurement responsibilities but may perform procurements less than \$50,000)
Name of Training Sessions						
Competitive Sealed Bids (IFB)		A	HD	M	M	
Competitive Sealed Proposals (RFP)		A	HD	M	M	
Emergency Procurement		A	HD	M	M	HO
Professional Services Procurement		A	HD	M	M	
Small Purchases		A	HD	M	M	M
Sole Source Procurement		A	HD	M	M	HO
Exemptions from HRS Chapter 103D		A	HD	M	M	HO
Evaluating RFP Proposals		A	HD	M	M	
Preparing an RFP		A	HD	M	M	
Request For Information (RFI) for Federal Grants		A	HD	M	M	
Overview on Procurement for Administrators, Managers		M	HD	M	M	
Travel Services		M	HD	M	M	
Inventory Management (State of Hawaii)			HD			
Surplus Properties			HD			
Chapter, 104 HRS: Wages and Hour of Employees on Public Contracts			A	M	M	
Construction Procurements			A	M	M	
Understanding Insurance Requirements for Contracts			A	M	M	
Ethics for State Procurement Personnel		M	M	M	M	M
Introduction to Green Purchasing		A	A	M	M	A
Contract Administration		A	HD	M	M	A
Basics of Procuring Health and Human Services						
Administrative Rule Changes for 103P						
Request for Information for Health and Human Services						
Developing a Request for Proposals						
Evaluating Proposals for Health and Human Services						
Methods of Source Selections: Treatment, Restrictive, Crisis, and Small Purchase						
Procuring Health & Human Services in the Electronics Age						
Hawaii Electronic Procurement System (HePS)						
M- Mandatory						
HD- Highly Desirable						
A- Advisable						
Level 1: Positions (i.e. State and County Department Heads, Deputy Directors, Executive Directors, Heads of Attached Agencies)						
Level 2: Positions (i.e. Designated Procurement Officers, Administrative Services Officer, Fiscal Officer, Budget Officer, etc.)						
Level 3: Positions (i.e. Departmental Contract Specialists, Purchasing and Supply Specialists, Purchasing Specialists, Program Managers, etc.)						
Level 4: Positions (i.e. Purchasing Technicians, Contracts Assistants, Buyer, Storeskeeper, etc.)						
Level 5: Positions (i.e. Clerical, etc.)						

# STATE PROCUREMENT OFFICE

# TRAINING COURSE DESCRIPTIONS

## PROCUREMENT OF GOODS, SERVICES, AND CONSTRUCTION

### HRS CHAPTER 103D

#### **SPO-CSB- SOURCE SELECTION METHOD – COMPETITIVE SEALED BIDS**

Instructions on the rules and procedures of the Competitive Sealed Bid (CSB) process, understand the different types, common terms and conditions, frequently asked questions, and problem areas.

Upon completion, attendees should be able to:

- Understand it is appropriate to use the CSB for their procurements
- Understand the basic requirements to prepare, solicit and award a CSB contract
- Understand the common pitfalls of CSB
- Understand challenges of CSBs

Attendee: Levels 3 and 4

Pre-Requisite

Courses: Understanding Insurance Requirements for Contracts

Course Length: To Be Determined

#### **SPO-CSP SOURCE SELECTION METHOD – COMPETITIVE SEALED PROPOSALS**

Instructions on the rules and procedures of the Competitive Sealed Proposal (CSP) process, understand different types, procedures, common terms and conditions (i.e., pre-proposal conferences, cost/pricing data, protest, debriefing, etc.), frequently asked questions, and problem areas.

Upon completion, attendees should be able to:

- Understand the differences between the use of a CSB and a CSP
- Understand when and why it is more appropriate to use the CSP for their purchase
- Understand the basic procedures followed to prepare, solicit and award a CSP contract
- Understand the common pitfalls of CSP
- Understand the challenges of CSPs

Attendee: Levels 3 and 4

Pre-Requisites

Courses: Understanding Insurance Requirements for Contracts

Course Length: To Be Determined

#### **SPO-EP SOURCE SELECTION METHOD – EMERGENCY PROCUREMENT**

Understand the definition of an emergency procurement, when is the use of an emergency procurement appropriate, what pre-existing conditions affect an emergency procurement, learn how and where to document an emergency procurement that is either under and over the small purchase dollar threshold, when is it appropriate to do an "after-the-fact" emergency procurement, and where, when, how to post an emergency procurement award.

Upon completion, attendees should be able to:

- Understand the definition of an emergency procurement
- Understand how to distinguish between an emergency procurement and other requests for immediate procurements
- Understand the approval process for under and over \$50,000
- Understand the required documentation for under and over \$50,000
- Understand requirements and deadlines for posting

Pre-Requisite

Courses: Small Purchases

Attendee: Levels 3 and 4

Course Length: To be determined

### **SPO-PS SOURCE SELECTION METHOD - PROFESSIONAL SERVICES**

Understand the definition of a professional service, what are the different types of professional services, different methods to procure professional services, requirements of section 103D-304, HRS, responsibilities of the review and selection committees, and where, when and how to post the professional service award (based on the source selection method used).

Upon completion, attendees should be able to:

- Understand the definition of a professional service as defined in Hawaii statutes
- Understand the different source selection methods available to procure professional services
- Understand how to procure under HRS section 103D-304 (Pre-Qualified List)
- Understand the posting requirements and websites for awards

Pre-Requisite

Courses: Small Purchases

Attendee: Levels 3 and 4

Course Length: To be determined

### **SPO-SP SOURCE SELECTION METHOD – SMALL PURCHASES**

Definition of a small purchase; review the policies and procedures of conducting small purchases; forms to use and how to properly document various small purchase procurements such as sole source, exemptions from HRS 103D, emergency, etc. The issue of parceling shall be discussed in detail.

Upon completion, attendees should be able to:

- Understand what constitutes a small purchase
- Understand the different methods available for small purchases
- Understand what constitutes parceling
- Understand the posting requirements and websites

Pre-Requisite

Courses: None

Attendee: Levels 3, 4 and 5

Course Length: to be determined

**SPO-SS- SOURCE SELECTION METHOD – SOLE SOURCE PROCUREMENT**

Understand the definition of a sole source procurement and the essential requirements, learn how to document a sole source procurement that is either under and over the small purchase dollar threshold, and learn where, when, how to post sole source awards.

Upon completion, attendees should be able to:

- Understand the definition of a sole source procurement
- Understand the difference between a sole source procurement and an request for exemption from HRS Chapter 103D
- Understand how to conduct a sole source procurement that is under and over the small purchase threshold
- Understand how to document sole source procurements
- Understand the posting requirements and websites for awards

Pre-Requisite

Courses: Small Purchases

Attendee: Levels 3 and 4

Course Length: To be determined

**SPO-PE- EXEMPTIONS FROM HRS CHAPTER 103D**

Understand what is the definition of a procurement exempt from HRS Chapter 103D, understand how and when it is appropriate to use the lists of procurements exempt from HRS Chapter 103D, understand the essential requirements, learn how to document an existing procurement exempt under HRS Chapter 103D, learn what forms are necessary and how to properly request an exemption if not currently exempt, and where, when, how to post procurement exempt from HRS Chapter 103D.

Upon completion, attendees should be able to:

- Understand the definition of an exemption from HRS Chapter 103D
- Understand the location of pre-approved exemptions from HRS Chapter 103D
- Understand the difference between an request for exemption from HRS Chapter 103D and a sole source request
- Understand how to request an exemption from HRS Chapter 103D if not pre-approved in the statutes
- Understand how to document an exemption from HRS Chapter 103D
- Understand the posting requirements and websites for awards

Pre-Requisites

Courses: Small Purchases

Attendee: Levels 3 and 4

Course Length: To be determined

**SPO-RFP-EV COMPETITIVE SEALED PROPOSALS (CSP)- THE EVALUATION COMMITTEE, EVALUATION CRITERIA, AND AWARD PURSUANT TO HRS CHAPTER 103D**

Detailed presentation of the responsibilities of the CSP Evaluation Committee and the involvement in the development of the evaluation criteria, a walk through of the evaluation process after proposals are received to the award of the contract and a discussion of the award, debriefing, and protest processes.

Upon completion, attendees should be able to:

- Understand the CSP evaluation process up to the award of the contract
- Understand the award, debriefing, and protest processes
- Understand the posting requirements and websites for awards

Pre-Requisite

Courses: Competitive Sealed Proposals  
Preparing an Request For Proposals

Attendee: Level 3 and 4

Course Length: To be determined

### **SPO-RFP-P PREPARATION OF A REQUEST FOR PROPOSALS (RFP)**

Lean an overview of the preparation of the RFP solicitation, which includes the proposal format, the offer form, scope of work, specifications, evaluation criteria, and the special provisions. Examples of RFP solicitations will be included.

Upon completion, attendees should be able to:

- Understand the overall process of a RFP
- Understand how to prepare an RFP
- Understand the posting requirements and websites for awards

Pre-Requisite

Courses: None

Attendee: Levels 3 and 4

Course Length: To be determined

### **SPO-RFI REQUEST FOR INFORMATION FOR FEDERAL GRANTS**

Learn what is a Request for Information (RFI), when is it necessary to prepare an RFI, how an RFI is used to in to apply for a federal grant.

Upon completion, attendees should be able to:

- Understand when an RFI is used
- Understand the requirements of an RFI
- Understand how to award a federal grant that utilizes the RFI process
- Understand the posting requirements and websites for awards

Pre-Requisite

Courses: Small Purchases

Attendee: Levels 3 and 4

Course Length: To be determined

### **SPO-OV OVERVIEW OF PROCUREMENT – HRS CHAPTER 103D**

Briefly review the history/background of the procurement code for purchasing goods, services, and construction, organization and procurement delegation, source selection methods, SPO price list and vendor lists, exemptions and ethics. Services that SPO provides and what they can do for your agency.

Upon completion, attendees should be able to:

- Understand the Hawaii Procurement Code- Chapter 103D, HRS
- Understand the different source selections and how they are awarded
- Understand the Hawaii Procurement Code and its application to agencies
- Understand the services the SPO provides to agencies
- Understand the posting requirements and websites for awards

Pre-Requisite

Courses: Small Purchases

Attendee: Levels 1 and 2

Course Length: To be determined

### **SPO-TRAVEL TRAVEL**

Step-by-step process for making intra-state hotel and car arrangements and out-of-state airline reservations, including an overview of the website and online services provided by the SPO vendor list. Review of the travel rules and forms available online.

Upon completion, attendees should be able to:

- Understand process for state travel
- Understand what is required to make reservations for hotel, car, airfare, etc.
- Understand documentation for pre-trip reservations and upon completion of travel

Pre-Requisite

Courses: None

Attendee:

Course Length: To be determined

### **SPO-INV ESSENTIALS OF INVENTORY PROPERTY MANAGEMENT**

Provides a comprehensive understanding on the requirements of the State of Hawaii's Inventory Management System. A power-point presentation will cover property accountability, internal control procedures, recording of property, supplies, disposal process, and the Quarterly Inventory Update Process including sample transactions to update your DAGS Inventory System account.

Upon completion, attendees should be able to:

- Understand requirements for the State's Inventory Management System
- Understand how to complete documentation and when/how to submit

Pre-Requisite

Courses: None

Attendee:

Course Length: To be determined

**SPO-SURPLUS STATE AND FEDERAL SURPLUS PROPERTY**

Tour the State's Surplus Property warehouse to view current available surplus items; details on the process to obtain state and federal surplus property.

Upon completion, attendees should be able to:

- Understand process for disposing of and acquiring surplus state property
- Understand what is available and how to acquire surplus state property
- Understand the documentation that is necessary for disposing or acquiring of surplus state property

Pre-Requisite

Courses: None

Attendee:

Course Length: To be determined

**SPO-WH CHAPTER 104, HRS WAGES AND HOURS OF EMPLOYEES ON PUBLIC CONTRACTS**

Learn an overview of Chapter 104, HRS, which requires all laborers and mechanics on public works projects to be paid prevailing wages and contractors to submit certified payrolls to their contracting state or county agency. Determination of prevailing wage, classification of laborers and mechanics, understanding allowable fringe benefits and how to spot problems on certified payrolls submitted for public works projects are covered.

Upon completion, attendees should be able to:

- Understand process for paying prevailing wages and contractor's certified payroll
- Understand determining prevailing wages, classification, fringe benefits, etc., with regards to public works contracts

Pre-Requisite

Courses: Construction Procurements

Attendee: Levels 3 and 4

Course Length: To be determined

**SPO-CON CONSTRUCTION PROCUREMENT**

Meet with representatives of the DAGS, Public Works Division to understand how they procure construction contracts, understand commonly used standard terms and conditions, understand contract forms and be able to discuss any aspects in construction procurement process.

Upon completion, attendees should be able to:

- Understand process and requirements for construction contracts used by DAGS
- Understand commonly used standard terms and conditions
- Understand differences from contracts for construction and goods/services under HRS Chapter 103D

Pre-Requisite Courses: Competitive Sealed Bids  
Attendee: Levels 3 and 4  
Course Length: To be determined

### **SPO-INS CONTRACT INSURANCE REQUIREMENTS**

Meet with representatives for DAGS, Risk Management Division and the State's Insurance Consultant to understand the who, what, when and why in requiring insurance, potential risks in contracting, different types of policies, understanding how to read insurance policies, and frequently asked questions. Although specifically for State Agencies, other entities are welcome to attend.

Upon completion, attendees should be able to:

- Understand process and requirements for construction contracts used by DAGS
- Understand commonly used standard terms and conditions
- Understand differences from contracts for construction and goods/services under HRS Chapter 103D

Pre-Requisite Courses: None  
Attendee: Level 3 and 4  
Course Length: To be determined

### **SPO-ETHICS ETHICS FOR STATE PROCUREMENT PERSONNEL**

Overview of the State Ethics Code, Chapter 84, Hawaii Revised Statutes, with an emphasis on ethics issues that are especially relevant for employees who procure goods and services for the State. Topics include conflicts of interest, outside employment with state vendors and contractors, acceptance of gifts, including meals trips, or any other gifts from vendors and contractors, misuse of official position and state resources, requirements for the award of contracts to state officials or to businesses in which state officials have controlling interests, and ethics restriction for former state employees who are employed by vendors or contractors doing business with the State.

Upon completion, attendees should be able to:

- Understand ethic issues as a state government employee
- Understand and avoiding conflicts of interest

Pre-Requisite Courses: None  
Attendee: All Levels  
Course Length: To be determined

### **SPO-GREEN INTRODUCTION TO "GREEN PURCHASING"**

Learn the environmental, economic, health and resource conservation benefits of "green purchasing" (also known as environmentally preferable purchasing or "EPP"), overview of the procurement mandates for agencies under state law (Chapter 196, HRS and AD 06-01), and provide information on how to identify and procure EPP in the price and vendor lists provided by the SPO. These include products with Energy Star ratings and those with recycled and bio-based content, ranging from office supplies to less toxic institutional

cleaning products. Learn how purchasing EPP saves money, energy and water resources, protects worker health and reduces pollution.

Upon completion, attendees should be able to:

- Understand what is green purchasing
- Understand benefits of green purchasing
- Understand how to purchase EPP

Pre-Requisite

Courses: None

Attendee: Levels 3 and 4

Course Length: To be determined

### **SPO-CAD CONTRACT ADMINISTRATION**

Understand the essential foundational steps required in efficient and effective contract administration, identify problematic areas of contract administration and learn ways to mitigate potential problems, find out the responsibilities of a contract administrator, and gain knowledge on methods that can be used to secure compliance to the terms and conditions of a contract.

Pre-Requisite

Courses: None

Attendee: Levels 3 and 4

Course Length: To be determined

### **HePS 100- HePS Basic Buyer Training**

A hands-on basic training for buyers who will be conducting small purchase request for quotes on HePS and will show how to use the HePS system. It includes an overview of HePS, issuing a requisition/solicitation, choosing commodity codes, amending a solicitation, awarding a solicitation, and searching the system for vendors, documents, etc.

Attendees: Procurement purchasing personnel responsible for conducting small purchase request for quotes on HePS for their division, branch or office.

Course Length: 5.75 hrs

Prerequisite: Understanding of Small Purchase method of source selection pursuant to HRS section 103D-305 and HAR 3-122, Subchapter 7; Small Purchases and HePS, approval from HePS department system administrator

### **HePS 100A- HePS Basic Approver Training**

For supervisory staff who will be electronically approving buyer purchases. The approver training shows approvers, how to review a solicitation or award and either approve or disapprove it. Approvers are encouraged to attend buyer training to have a full understanding of HePS. However, it is not required. The use of electronic approvals is the decision of each department. Approval routes must be established through your HePS system administrator. They do not occur automatically.

Attendees: Supervisors of procurement personnel conducting small purchase request for quotes on HePS or purchasing personnel with approval responsibilities for small purchase request for quotes.

Course Length: .5 hrs

rerequisite: Understanding of small purchase method of source selection (HRS section 103D-305 and HAR 3-122, Subchapter 7); Small Purchases and HePS, approval from HePS department system administrator

### **HePS 101- HePS Refresher Training and Help Session**

Only for buyers who have already taken the HePS basic training more than one month ago and need a refresher on the basics. Approximately 1 hour will be spent on refresher; the remaining time will be to address common problems. Bring your solicitation information.

Attendees: Procurement purchasing personnel responsible for conducting small purchase request for quotes on HePS for their division, branch or office.

Course Length: 4 hrs

Prerequisites: HePS Basic Buyer Training, working knowledge of small purchase method of source selection pursuant to HRS section 103D-305 and HAR 3-122, Subchapter 7; Small Purchases and HePS

### **HePS 102- HePS Help Clinic**

An open-house session for buyers who have already taken HePS Basics and would like hands-on help with specific issues. There is no agenda for this session. Bring your solicitation information and questions.

Attendees: Procurement purchasing personnel responsible for conducting small purchase request for quotes on HePS for their division, branch or office and approvers

Course Length: as needed

Prerequisites: HePS Basic Buyer Training, working knowledge of Small Purchase method of source selection (HRS section 103D-305 and HAR 3-122, Subchapter 7); Small Purchases and HePS

### **HePS 200- HePS Beyond the Basics for Buyers**

For buyers who have utilized HePS, have a basic understanding of its use and are ready to learn some advanced features. Topics will include: understanding commodity codes, using the Pre-Bid Conference (new feature), using Vendor Questions and Answers (new feature), understanding approval routes, cancelling a solicitation already closed, awarding a single line item, awarding multiple line items, cancelling an award and awarding to a different vendor, creating a change order, finding documents and awards, and using the contract expiration tracker.

Attendees: Procurement purchasing personnel responsible for conducting small purchase request for quotes on HePS for their division, branch or office.

Course Length: 5.5 hrs.

Prerequisites: HePS Basic Buyer Training; completion of at least 2 HePS solicitations; working knowledge of small purchase method of source selection (HRS section 103D-305 and HAR 3-122, Subchapter 7); SPO class Small Purchases and HePS

### **HePS 250s- HePS System Administrator Reports, etc.**

Hands-on training for system administrators for departments/jurisdictions. Topics include the various reports system administrators can run with a click; locating solicitations and status, a short review of some new features of the recent upgrade; questions and answers.

Attendees: HePS system administrators

Course Length: 2 hours

Prerequisites: This class is only open to HePS system administrators.

# **PURCHASE OF HEALTH AND HUMAN SERVICES**

## **CHAPTER 103F, HRS**

### **The Basics of Procuring Health and Human Services Pursuant to Chapter 103F, HRS**

Overview of how to procure health and human services pursuant to Chapter 103F, HRS including: definition of procurement, differences between public procurement and procurement in the private sector, the five methods of procurement, a brief review of the RFP template, exemptions, overview of Chapter 103F, HRS and administrative rules, the contracts database reporting system, the SPO website and more.

Attendees: Purchasing personnel, program managers/specialists, or other personnel who plan for health and human services, conduct procurements or contract for competitive (RFP) treatment, crisis, restrictive or small purchase of service contracts, County agency personnel wishing to learn about procurement pursuant to this chapter;

Prerequisite: None

Course Length: 3 hours

### **Planning, Utilizing the Requests for Information (RFI) and Collaboration in Contracting for Health and Human Services**

Overview of planning, the team approach, requirements for conducting requests for information, collaboration that does not impinge on open competition for contracts, utilizing the RFP and contracts database websites and the report of planned purchases as planning tools; procurement, the RFI and applying for federal grants.

Attendee: Purchasing personnel, program managers/specialists, or other personnel involved in the planning, procuring or contracting for health and human services.

Prerequisite: Basics of Procuring Health & Human Services

Course Length: 2 hours

### **Treatment, Restrictive, Crisis and Small Purchase of Services, and Exemptions from Chapter 103F**

An in-depth review of the source selection methods other than competitive (RFP), including conditions for use, procedure for requesting approvals, forms, procurement notice requirements, posting requirements and record-keeping.

Attendees: Purchasing personnel, program managers/specialists, or other personnel who plan for health and human services, conduct procurements or contract for treatment, crisis, restrictive or small purchase of service contracts.

Prerequisite: Basics of Procuring Health & Human Services

Course Length: 3 hours

### **The Request for Proposals (RFP) Process for Health & Human Services Pursuant to Chapter 103F (Competitive Method of Procurement)**

Overview of the RFP development process, including the RFP team, timelines, RFP templates, conditions for use, administrative requirements, service specifications, instructions for responding to the RFP, evaluation criteria, and attachments; deciding when to require supporting documents; the RFP and contracts database

websites as planning tools; procurement notice requirements; RFP orientation meeting and RFP addenda.

Attendees: Purchasing personnel, program managers/specialists, or other personnel who plan for health and human services, conduct procurements or contract for competitive (RFP) purchase of service contracts.

Prerequisite: Basics of Procuring Health & Human Services

Course Length: 3 hours

### **Evaluating Proposals Received in Response to an RFP for Health and Human Services**

Overview of proposal evaluation and steps to take from the receipt of proposals to notice of award, including register of proposals, mandatory requirements, correctable errors, rejection of proposals, evaluator and advisor qualifications and training, confidentiality issues, evaluation criteria, scoring proposals and documentation, discussion with applicants after proposal submittal deadline, notice of award - statement of findings and decision, contract negotiations, inadequate response to an RFP.

Attendees: Purchasing personnel, program managers/specialists, or other personnel writing, conducting, or evaluating RFPs, administering or monitoring competitive purchase of service contracts.

Prerequisite: The Request for Proposals Process

Course length: 2.5 hours

### **RFPs - Getting From a Notice of Award to An Executed Contract**

Overview of the process from the notice of award through the execution of a contract, including statement of findings and decision, protests and requests for reconsideration, contract negotiations and discussions with applicants after award, contract development, preventing interruption of services.

Attendees: Purchasing personnel, program managers/specialists, or other personnel writing, conducting, evaluating RFPs and/or administering or monitoring competitive purchase of service contracts.

Prerequisite: The Request for Proposals Process

Course length: 3 hours

### **Procuring Health and Human Services in the Electronic Age: Contracts Database Reporting System (CDRS), Request for Proposals Website (RFPW), and e-procurement**

Overview of purpose and capabilities of the CDRS, RFPW and HePS, the Hawaii e-procurement System. Brief review of reports and search capabilities.

Attendees: Purchasing personnel, program managers/specialists, or other personnel responsible for contracts or purchases pursuant to Chapter 103F for health and human services contracts exempt from Chapter 103F.

Prerequisite: None

Course length: 2 hours

## **Overview of Procurement of Health and Human Services for Administrators**

Provides an overview of the methods of procurement for health and human services, the conditions under which they apply, considerations when applying for federal grants with regard to procurement, understanding when requests for exemption are appropriate. **Note:** this workshop is for administrators and supervisors.

Attendees: Administrators or managers supervising purchasing personnel, program managers/specialists, contract administrators, planners or other personnel responsible for contracts or purchases of health and human services.

Prerequisite: None

Course length: 1.5 hours