

TEXAS A&M UNIVERSITY-KINGSVILLE

Title: Requirements for Training & Certification of Procurement Professionals

Procedure No.: PP-036

Date: 9/16/04

I. Purpose

To define certification and training requirements for purchasing professionals.

II. Scope

This procedure applies to all purchases (commodities, services, and construction) made after November 30, 2001.

III. Certification and Training Requirements

The following minimum standards will apply to University employees who participate in purchasing functions using state funds:

- 1) Employees making purchases resulting in expenditures under \$5,000 are required to take local training.
- 2) Employees making purchases resulting in expenditures from \$5,000 to \$15,999 are required to take Texas Basic Public Purchasing. There is no requirement for certification.
- 3) Employees making purchases resulting in expenditures from \$15,000 to \$99,999 are required to take Texas Basic Public Purchasing, Texas Advanced Public Purchasing, and be certified as a Certified Texas Public Purchaser. (CTPP)
- 4) Employees making purchases resulting in expenditures of \$100,000 and above, purchasing managers, and employees who use the request for proposal (competitive proposal) method, are required to take Texas Basic and Advanced Public Purchasing, Contract Administration, Cost and Price Analysis, and Negotiations. They are required to be certified as Certified Texas Procurement Managers. (CTPM)

These rules are effective November 30, 2001.

IV. Purchasing Professionals Defined

For purposes of the TBPC's procurement training and certification program purchasing personnel will be defined as all state agency and employees of institution of higher education to who any of the following conditions apply:

1. An employee who is responsible for any of the following purchasing/contracting functions as a regular part of their job:
 - Develops specifications based on user department's requirements.
 - Deciding the appropriate procurement method (i.e. -TBPC term contracts, formal or informal IFB, QISV, TBPC Open Market, RFP).
 - Identify and/or select potential vendors.
 - Solicitation of bids, requests for proposals, requests for offers, etc. from suppliers.
 - Evaluations and award of bids, proposals, offers, contracts, etc..
 - Administration of contracts/purchase orders from award to completion.
2. An employee who is responsible for the purchasing/contracting function of the agency or institution of higher education with the exception of real estate leasing and *major construction projects.
3. An employee who is empowered to sign purchase orders or contracts with the exception of real estate leasing and *major construction projects.

* Major construction projects will be defined as those projects requiring the signature of the institution of higher education's president, chancellor, vice chancellor, regents, or an agency's executive director (or higher).