

Sample Training and Certification Program
(This Sample is provided for illustration purposes only)

Type of Purchase	Commitment Level	Minimum Hours of Training	Type of Training	Certification
1.) Spot Market Purchases (e.g., purchases of routine supplies, materials, periodicals)	< \$15,000	4 hours	A (see note)	None
2.) Purchases of \$50,000.00 or less for materials, supplies, services, and/or equipment using informal bidding methods – direct contract purchases under existing or approved local, state, or group purchasing contracts, or specialty product purchases of restricted items on a sole source/proprietary non-competitive basis	≤ \$50,000	16 hours	B (see note)	None
3.) Purchases over \$50,000 (e.g., purchases for materials, supplies, services, and/or equipment for which formal bid (ITB) methods are required; purchases are of a generally non-complex nature, such as annual supply orders, maintenance services, or small capital equipment; individual is responsible for approving solicitations for advertisement, decides appropriate procurement method, and solicits, evaluates, and awards bids)	Up to \$100,000	24 hours	C (see note)	A.P.P., C.P.P.B. or C.T.P.
4.) Purchases over \$100,000.00 (e.g., purchases for materials, supplies, services, and/or equipment for which formal methods of procurement are used (ITB, RFP); purchases are generally of a complex nature, such as major capital purchases, lease purchase agreements, master purchase agreements; individual is responsible for approving solicitations for advertisement, decides appropriate procurement method, and solicits, evaluates, and awards bids, offers, proposals and contracts)	Over \$100,000	24 hours	D (see note)	C.P.M., C.P.P.O. or C.T.P.M.
5) Direct contract negotiations for the purchase of Information Resources Technologies	as established by DIR	as required by DIR	E (see note)	DIR

Notes:

(A) Individuals performing the procurement function(s) requiring Type “A” training will receive, at a minimum, training consisting of the “Core Curriculum,” which includes:

- Ethics
- Supplier relations
- The University of Texas System HUB Program
- Applicable laws, rules and regulations
- Principles of “best value” procurement
- Role of the buyer and the buyer’s fiduciary responsibility
- Documentation and records management
- Applicable policies and procedures
- Contract administration

Dependent on an individual’s specific duties and responsibilities, the primary procurement officer may require that the individual complete additional training as specified by the primary procurement officer; e.g.,

sole-source/proprietary procurements, the procurement cycle, and basics of specification writing.

(B) Individuals performing the procurement function(s) requiring Type “B” training will receive, at a minimum, training consisting of the “Core Curriculum” listed in Note A, above, and the following:

- Purchasing cycle
- Specification writing
- Basic purchasing law
- Basic negotiations
- Supplier selection and price analysis
- Texas Purchasing techniques and methods
- Reporting Requirements

Dependent on an individual’s specific duties and responsibilities, the primary procurement officer may require that the individual complete additional training as specified by the primary procurement officer.

(C) Individuals performing the procurement function(s) requiring Type “C” training will receive, at a minimum, the training listed in Note B, above, and the following:

- Advanced purchasing law
- Contract management and administration
- Advanced negotiations
- Value-cost analysis
- Advanced specification writing

Dependent on an individual’s specific duties and responsibilities, the primary procurement officer may require that the individual complete additional training as specified by the primary procurement officer; e.g., contracting for services, major construction/renovation projects, requests for proposals.

(D) Individuals performing the procurement function(s) requiring Type “D” training will receive, at a minimum, training listed in Note C, above, and the following:

- Requests for proposals
- Contract writing
- Supply-chain management
- Performance contracting

Dependent on an individual’s specific duties and responsibilities, the primary procurement officer may require that the individual complete additional training as specified by the primary procurement officer; e.g., software licensing, high-tech purchasing, equipment leasing, purchasing management and administration.

(E) Individuals performing the procurement function(s) requiring Type “E” training will receive, at a minimum, DIR training related to effective negotiation of contracts for Information Resources Technologies.