

## Section 1.1

### Training and Certification

To help keep state purchasing and contract management personnel trained in accordance with state law, TPASS offers a variety of training and certification opportunities. The goal of the TPASS Training and Certification program is to exceed the statutory requirement by offering public purchasing courses and certification testing specifically designed for Texas procurement that includes three levels of purchaser training and two levels of purchaser certification and continuing education for certified individuals. In addition, contract management training is offered along with an optional certification and continuing education for certified individuals.

It is the responsibility of senior agency management to decide the most appropriate training track for agency employees. To facilitate this effort, senior procurement officials at all state agencies should assess the training and certification requirements of their employees and submit the results, as part of their annual procurement plan.

Information on [training opportunities, continuing education and resources](#) is available online.

#### Requirements for Procurement Personnel

Pursuant to Gov't Code §2155.0178, the Texas Procurement and Support Services administers a system of training, continuing education and certification for state agency purchasing personnel.

Each state agency shall ensure that the agency's purchasing personnel complete the training and certification developed under this section. It is not the intent of this definition to include (1) an executive level manager authorized to bind the governmental entity or (2) an attorney performing traditional legal functions – such as legal review of a contract.

In addition to state agencies, employees of institution of higher education to which Section 51.9335, Education Code, applies or to an institution to which Section 73.115, Education Code, applies are encouraged to attend. Entities participating in TPASS's cooperative purchasing program of all offered TPASS contracts are especially encouraged to attend. Examples include school districts, police and fire departments, city and county governments and community colleges.

The following SAO classifications may be used as a reference to help identify individuals who are required to receive TPASS's purchaser training:

<b>Class Number</b>	<b>Class Title</b>	<b>Salary Group</b>	<b>Occupational Category</b>
1911	Inventory and Store Specialist I	A10	Property Management and Purchasing
1912	Inventory and Store Specialist II	A12	Property Management and Purchasing
1913	Inventory and Store Specialist III	A14	Property Management and Purchasing
1920	Grant Coordinator I	B18	Property Management and Purchasing
1921	Grant Coordinator II	B20	Property Management and Purchasing

1930	Purchaser I	B12	Property Management and Purchasing
1931	Purchaser II	B14	Property Management and Purchasing
1932	Purchaser III	B16	Property Management and Purchasing
1933	Purchaser IV	B18	Property Management and Purchasing
1934	Purchaser V	B20	Property Management and Purchasing
1935	Purchaser VI	B22	Property Management and Purchasing

### **Purchaser Training and Certification**

The 75<sup>th</sup> Legislature mandated that state purchasing personnel be trained and certified to the extent required by the Comptroller of Public Accounts (TPASS). In accordance with Texas Government Code §2155.078, TPASS administers a system of training, continuing education, and certification that includes three levels of training and two levels of certification.

### **Who Should Attend**

In accordance with Texas Government Code §2155.078, each state agency shall ensure that the agency's purchasing personnel complete the training and certification developed under this section.

In addition to state agencies, employees of political subdivisions and other governmental entities may attend. Examples include school districts, police and fire departments, city and county governments and community colleges. Entities participating in TPASS's cooperative purchasing program of all offered TPASS contracts are especially encouraged to attend.

For more information, please view the [Requirements for Procurement Personnel](#) diagram. This diagram is not all inclusive and is only provided as an example for state agencies to use as a guide to determine who is required to attend the purchasing training required by Gov't Code §2155.0178

### **Purchaser Training**

TPASS's purchaser training and certification program consists of the following three training classes:

#### ***Texas Basic Public Purchasing (BPP)***

Basic Public Purchasing is an entry level survey course covering the principles of public purchasing in Texas. By taking this class the learned will be able to:

- Demonstrate a general knowledge of Texas Public Purchasing requirements.
- Explain the various steps in the procurement cycle.
- Perform purchasing responsibilities in an ethical manner.
- Prepare flexible, accurate, clear, competitive and simple (FACCS) specifications.

- Select the state approved purchasing method that will result in a best value acquisition for the state.
- Define their delegated purchasing authority.
- Efficiently and effectively solicit vendors.
- Compare and contrast bids and proposals.
- Make a best value determination for contract award.
- Identify logistical impacts to the purchasing process.
- Report and document required information.
- Navigate the TPASS website to find needed information.
- Enter the APP class (if required) with a minimum knowledge base.

### ***Texas Advanced Public Purchasing (APP)***

Advanced Public Purchasing is a more in-depth look at the purchasing techniques and concepts introduced in Basic Public Purchasing. By taking this class the learner will be able to:

- Use project management tools to effectively manage contracts.
- Describe how to identify and minimize risks when making high-dollar purchases.
- Apply technical writing principles and techniques to create FACCS specifications.
- Conduct negotiations using basic skills, techniques and strategies.
- Describe the various state contracts and when to use each.
- Improve contract administration skills.

### ***Cost & Price Analysis, Negotiations, Contract Administration (CNC)***

The CNC class is an advanced class designed for experienced purchasers. By taking this class the learner will be able to:

- Explain the difference between cost and price.
- Illustrate how the economy influences pricing.
- Use costs and price analysis to help make a best value determination for contract award.
- Evaluate the steps and techniques in the negotiation process.
- Develop an effective negotiating team.
- Define the proper steps for contract termination.
- Identify and manage vendor performance strengths and weaknesses.

View the [current class schedule](#).

## **Purchaser Certification**

### ***Certified Texas Purchaser (CTP)***

For purchases between \$0.00 and \$25,000, even though no formal certification is required, individuals must have attended the Basic Public Purchasing Class within six months of employment.

CPT certification is required for individuals to make purchases between \$25,000.01 and \$100,000.

The CTP exam is a multiple choice exam that concentrates on the basics of purchasing in Texas. The exam may cover anything in the Basic and Advanced Public Purchasing classes, the TPASS Procurement Manual and other materials supplied during the classes.

To be eligible for CTP certification, you must have one (1) year's purchasing experience, have completed the Basic and Advanced Purchasing classes or the equivalent (i.e. be currently certified as CPPB by NIGP or A.P.P. by ISM) and receive a 70% or higher on the CTP exam.

### ***Certified Texas Procurement Manager (CTPM)***

CTPM certification is required for individuals to make competitive purchases over the amount of \$100,000

The CTPM exam is a multiple choice exam that concentrates on advanced purchasing skills including cost and price analysis of goods and services, advanced negotiation techniques and contract administration and management. The exam may cover anything in the Basic, Advanced and CNC Purchasing classes, the TPASS Procurement Manual, the Contract Management Guide and other materials supplied during the classes.

To be eligible for CTPM certification, you must have three (3) years purchasing experience, have completed the Basic, Advanced and CNC Purchasing classes or the equivalent (i.e. be certified as CPPO or C.P.M. by ISM) and receive a 70% or higher on the CTPM exam.

**Purchasing Experience: Procuring commodities, equipment or services applying procurement guidelines, rules, policies and laws; i.e.** prepares or assists with the preparation of specifications, Identifies and/or selects potential vendors, prepares and advertises solicitation documents, assists with reviewing tabulations and analyzing bids to determine the lowest and best responses for award recommendation, prepares and issues purchase orders to awarded vendors.

### **Maintaining Certification**

State of Texas purchasers certified through TPASS's Training and Certification program are required to complete 120 hours of continuing education over a five (5) year period, beginning from the issue date or last renewal date of the Texas certification, with no more than 45 hours during any one year period.

View the current [professional development class schedules](#).

To assist certified purchasers with finding continuing education opportunities, TPASS maintains a [continuing education clearinghouse](#).

### **Contract Manager Training (CMT)**

The 79<sup>th</sup> Legislature mandated that state contract management personnel be trained and certified to the extent required by the Texas Comptroller of Public Accounts (TPASS). The program developed by TPASS to satisfy this mandate contains three (3) levels of required training.

### **Who Should Attend**

In accordance with Texas Government Code §2262.053, each state agency shall ensure that the agency's contract managers complete the training developed under this section.

In addition to state agencies, employees of political subdivisions and other governmental entities may attend. Examples include school districts, police and fire departments, city and county governments and community colleges.

View the [Requirements for Contract Managers](#) page. This information is not all inclusive and is only provided as an example for state agencies to use as a guide to determine who is required to attend the contract manager training required by Gov't Code §2262.053.

TPASS's contract manager training program consists of three (3) training classes:

*Contract Management Performance and Source Selection (CMPSS)*

*Project Management Principles (PMP)*

*Advanced Negotiation Strategies (ANS)*

View the [current class schedule](#).

View the [Contract Management Program information](#) (testing, certification, applications, and publications).

## **Training and Certification Program and Classes Registration**

[Training and Certification Program](#)

Students may [register for classes on line](#).

View [other forms](#) (i.e. list of certified individuals, testing and certification applications).

For additional information, please contact TPASS's Training & Certification Program at 512-463-5355 or [cpt@cpa.texas.gov](mailto:cpt@cpa.texas.gov).