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August 19, 2008

PROCUREMENT CIRCULAR NO. 2008-05

TO: Executive Department Heads  
Chief Procurement Officers

FROM: Aaron S. Fujioka

SUBJECT: Statewide Procurement Training

Procurement Circular 2007-06 dated August 31, 2007 is rescinded.

The State Procurement Office (SPO) has updated the schedule of statewide procurement training workshops for all purchasing personnel. The available session dates, and the registration process are accessible on the SPO homepage at [www.spo.hawaii.gov](http://www.spo.hawaii.gov), click on 'Training for State and County Procurement Personnel'.

Pursuant to Act 194, SLH 2008, effective January 1, 2009, each state procurement officer of a department of the executive branch which includes UH, DOE, HHSC, and OHA shall attend a mandatory fundamental training and development session within sixty days of being appointed or named to the position of procurement officer.

To assist departments in determining the necessary workshops purchasing personnel need to meet the mandatory training requirement, the workshop description includes information on the delegated levels of procurement authority and required training for each level.

The SPO training website includes:

- Workshop descriptions;
- Workshop training materials - attendees are responsible to print the on-line handout for each session;
- Location and schedule; and
- On-line registration system.

Seating for each session is limited by room location and registration will be accepted on an as-available basis. The SPO webpage will serve as the only notification of any updates or changes. Attendees should check at least one week prior to the scheduled workshop session for changes or cancellations.

Executive Department Heads  
Chief Procurement Officers  
Procurement Circular No. 2008-05  
August 19, 2008

There is no cost for the training sessions. Any travel arrangements are the responsibility of the attendee. Most locations offer sufficient parking, but attendee should plan accordingly in the event they need to find alternate parking.

Your staff may contact the following individuals, if they have any questions.

<u>HRS Chapter 103D</u> Hawaii Public Procurement Code (Goods, Services & Construction)	Colin Tanaka	586-0558	<a href="mailto:colin.y.tanaka@hawaii.gov">colin.y.tanaka@hawaii.gov</a>
<u>HRS Chapter 103F</u> Purchases of Health & Human Services	Corinne Higa	587-4706	<a href="mailto:corinne.y.higa@hawaii.gov">corinne.y.higa@hawaii.gov</a>
Hawaii Electronic Procurement System (HePS)	Mara Smith	587-4704	<a href="mailto:mara.smith@hawaii.gov">mara.smith@hawaii.gov</a>

If you have any questions please call me at 587-4700.

State of Hawaii

**State Procurement Office**HRS Chapter 103D, Hawaii Public Procurement Code  
HRS Chapter 103F, Purchase of Health and Human Services
**Procurement Training**  
**For State & County Agency Personnel**  
 Syllabus ~ Workshop Descriptions
*Last updated: September 15, 2008*

Following is a listing of the State Procurement Office (SPO) workshops. Please check this site regularly for new workshops, and newly scheduled sessions. Once registered, check prior to session date as **this will be the only notification of cancellations/changes.**

**Goods, Services and Construction | Health and Human Services | Hawaii eProcurement (HePS)**

Check the SPO training schedule site prior to session date for changes/cancellations.

Workshop handouts will be available on the SPO training site prior to the session. Print and bring it with you.

	Workshop	Applies to:			Attendees Position Levels	
		Goods, Services & Construction (HRS 103D)	Health & Human Services (HRS 103F)	HePS	Mandatory	Recommended
	(Click on title for description and requirements)					
Schedule	Competitive Sealed Bids	X		X	2, 3, 4 HePS eIFB buyers, approvers	1
Schedule	Competitive Sealed Proposals (RFP)	X			2, 3, 4	1
Schedule	Emergency and Sole Source Procurements	X			2, 3, 4	1
Schedule	Professional Services	X			2, 3, 4	1
Schedule	Small Purchases	X		X	3, 4, 5, HePS eRFQ buyers, approvers	1, 2
Schedule	Exemptions from HRS Chapter 103D	X			2, 3, 4	1
Schedule	Construction Procurements	X			3, 4	2
Schedule	Contract Administration	X	X		2, 3, 4	
Schedule	Contract Processing Requirements	X				3, 4, 5
Schedule	Electronic Procurement Reporting Systems/Websites Overview	X				3, 4, 5
Schedule	Green Purchasing					2, 3, 4, 5
Schedule	Insurance Requirements for Contracts	X	X		2, 3, 4	
Schedule	Intra and Out-of-State Travel Procedures				Personnel responsible for travel arrangements	

					and staff responsible for pre- and post review of travel documents	
Schedule	Inventory Management				Personnel tasked with inventory management	
Schedule	Open Procurement Forum	X			3	
Schedule	Overview of Procurement Practices, HRS Chapter 103D	X			1, 2	
Schedule	Overview of Property Loss, Auto Accident, and Tort Claims	X				3, 4
Schedule	pCard Overview and Updates					Highly Recommended for all pCard holders
Schedule	pCard Program Changes and Updates				Dept pCard Administrators, 1	
Schedule	Personal Services Contracting	X			2, 3, 4	
Schedule	Prevailing Wage, Certified Payroll and Contracting Agency Responsibilities	X			2, 3, 4	
Schedule	Public Disclosure of Procurement Records					Personnel tasked with disclosure of procurement records
Schedule	SPO Price and Vendor Lists/Cooperative Contracts	X			3, 4, 5	2
Schedule	Surplus Properties					
Schedule	HePS Basic User Training for Small Purchase Request for Quotes	X		X	2, 3	
Schedule	HePS Basic Approver Training	X		X	2, 3	
Schedule	HePS Refresher Training for Buyers	X		X	2, 3	
Schedule	HePS Open Session: Specialized Help Clinic	X		X		HePS users needing assistance with specific problems
Schedule	HePS Beyond the Basics for Buyers	X		X	2, 3	
Schedule	HePS Basics, Refresher and Beyond for Approvers	X		X	2, 3	
Schedule	HePS Basics and Refresher for System Administrators	X		X	HePS Department/Jurisdiction System administrators	
Schedule	HePS Beyond the Basics for System Administrator Training: Reports	X		X	HePS Department/Jurisdiction System administrators	
Schedule	HePS Basic User Training for Competitive Sealed	X		X	2, 3	

	Bids					
Schedule	Basics of Procuring Health and Human Services		X		2, 3	4
Schedule	Planning, Using the Request for Information (RFI) and Collaboration for Health and Human Services.		X		2, 3	1, 4
Schedule	Treatment, Restrictive, Crisis and Small Purchases and Exemptions from HRS 103F		X		2, 3	1, 4
Schedule	RFP Process for Health & Human Services		X		2, 3	1, 4
Schedule	Evaluating Proposals for RFPs for Health & Human Services		X		2, 3	1, 4
Schedule	RFPs: Getting From a Notice of Award to An Executed Contract for Health & Human Services		X		2, 3	1, 4
Schedule	The Website for Planning, Procuring and Contracting Health & Human Services		X		2, 3, 4, 5	1
Schedule	Overview of Procurement of Health & Human Services		X		1	2
Schedule	Open Session: Procurement of Health & Human Services		X			3
Schedule	POST (State Purchase of Service Team) for Health and Human Services)		X			2, 3

## Chapter 103D, HRS, Hawaii Public Procurement Code (Goods, Services and Construction)

### Workshop No. 100: Competitive Sealed Bids (CSB)

This session will cover 3 different segments of the CSB process. The first segment will cover the rules and procedures of the competitive sealed bid process and provide a sample of a typical Invitation for Bids (procurement notes, pre-bid conferences, specifications, protest procedures, etc.). The second segment will provide an overview of the various preferences applicable to a CSB. The third segment will briefly review the information needed for placing a competitive sealed bid on HePS and some of the differences in using eProcurement.

**Mandatory Attendees: Levels 2, 3 and 4 who have not attended 2006 or 2007 sessions**

Recommended Attendees: Level 1

Session Length: 3.5 hours

Not Intended for: Level 5

### Workshop No. 105: Competitive Sealed Proposals (CSP)

This session is made up of two parts. Part One will provide an overview of the preparation of the Request for Proposals and walk you through the CSP process. Attendees of previous CSP sessions may want to consider attending Part Two only for a "hands on" opportunity to work with RFPs. Attendees are invited to bring current or previous RFPs for discussion.

**Mandatory Attendees: Levels 2, 3 and 4 who have not attended 2006 or 2007 sessions**

Recommended Attendees: Level 1

Session Length: 3 hours (Part One - 2 hours; Part Two - 1 hour)  
Not Intended for: Level 5

### **Workshop No. 110: Emergency and Sole Source Procurements**

Understand what is an emergency and sole source procurement; forms use to document the procurement; examples provided; processes to obtain CPO approval; posting award information; and allow for questions from attendees.

**Mandatory Attendees: Levels 2, 3 and 4 who have not attended 2006 or 2007 sessions**

Recommended Attendees: Level 1

Session Length: 1.5 hours

Not Intended for: Level 5

### **Workshop No. 115: Professional Services**

Understand the what is a 'professional services' step through the processes to procure professional services; review and selection committees; conducting a debriefing; posting of award; and allow for questions from attendees

**Mandatory Attendees: Levels 2, 3, 4 who have not attended the 2006 or 2007 sessions**

Recommended Attendees: Level 1

Session Length: 1.5 hours

Not Intended for: Levels 5

### **Workshop No. 120: Small Purchases**

This session is basic training for conducting small purchases and small purchases to be procured through HePS. It is intended for procurement personnel with little or no experience that utilize this source selection in HRS Chapter 103D.

**Mandatory Attendees: Levels 3, 4 and 5 who have not attended the 2006 or 2007 sessions; all HePS eRFQ buyers and approvers**

Recommended Attendees: 1, 2

Session Length: 2.5 hours

### **Workshop No. 125: Exemptions from HRS Chapter 103D**

Understand what is an 'exemption from HRS Chapter 103D'; lists of exempt procurements; the essential requirements and how to document the exempt procurement; necessary forms; process to obtain CPO approval; posting award, and allow for questions from attendees.

**Mandatory Attendees: Level 2, 3, and 4 who have not attended 2006 or 2007 sessions**

Recommended Attendees: Level 1

Session Length: 1.5 hours

Not Intended for: Level 5

### **Workshop No. 130: Construction Procurements**

Meet with representatives from the DAGS, Public Works Division, to understand construction contracts; standard terms and conditions used, and ask questions as they related to your agency's construction contracts.

**Mandatory Attendees: Level 3 and 4 who have not attended 2007 session**

Recommended Attendees: Level 2

Session Length: 1.5 hours

Not Intended for: Level 5

### **Workshop No. 135: Contract Administration**

Provides a working knowledge of the necessary components in efficient and effective contract administration; identify problematic areas of contract administration and methods to mitigate potential problems; review the responsibilities of a contract administrator; gain knowledge on methods used to secure compliance to the terms and conditions of a contract.

**Mandatory Attendees: Levels 2, 3 and 4 who have not attended 2007 session**

Session Length: 1.5 hours

Not Intended for: Level 5

**Workshop No. 136: Contract Processing Requirements**

An overview by DAGS-Accounting Division to understand requirements when submitting a contract for certification and encumbrance that will include, but not limited to, common errors in a pre-audited contract, requirements of a multi-term contracts, etc. This workshop will also cover documents required when submitting payment requests for travel.

Recommended Attendees: **Levels 3, 4 and 5**

Session Length: 1 hour

**Workshop No. 140: Electronic Procurement Reporting Systems/Websites Overview**

This session provides an overview of various electronic systems and websites agencies are required to post for procurement information. Systems to be covered include the Procurement Notices System (PNS), Procurement Reporting System (PRS), Professional Services Awards, and the Hawaii Compliance Express (HCE). Attendees will have the opportunity to understand the posting requirements and to ask questions on its use. In addition, there will be a detailed explanation of procurement information that is available on the SPO homepage website for both the government employees and the public.

Recommended Attendees: Levels 3, 4 and 5

Session Length: 1 hour

**Workshop No. 145: Green Purchasing**

Session will introduce the environmental, economic, health and resource conservation benefits of 'green purchasing' (also known as environmentally preferable purchasing, or 'EPP'); provide an overview of the procurement mandates for agencies under state law (Chapter 196, HRS and AD 06-01); how to identify and procure environmentally preferable products in the price and vendor lists provided by the State Procurement Office. These include products with Energy Star ratings and recycled and bio-based content, ranging from office supplies to less toxic institutional cleaning products. Also discussed will be the supplemental state contract with Grainger, Inc. provided through the Western States Contracting Alliance, which offers expanded purchasing opportunities. Learn about how green purchasing saves money, energy and water resources, protects worker health and reduces pollution.

Recommended Attendees: Levels 2, 3, 4, and 5

Session length: 2 hours

**Workshop No. 150: Insurance Requirements for Contracts**

Learn the who, what, when, and why in requiring insurance and understand potential risks for contracting purposes. Be able to understand the different types of policies and requirements for contracting purposes.

Mandatory Attendees: **Levels 2, 3 and 4 who have not attended 2007 session**

Recommended Attendees: Personnel responsible for risk management decisions and insurance

Session Length: 3 hours

Not Intended for: Level 5

**Workshop No. 155: Intra and Out-of-State Travel Procedures**

This session will cover the procedures required for all authorized travel, the forms, and policies designed to facilitate travel arrangements (air, hotel, car, ferry service, and other ground transportation) for all official travel. The workshop will also cover procedures and policies for intra-state car rental arrangements. Time will be allowed for questions from attendees.

Note: Additional requirements imposed by individual departments will not be covered.

**Mandatory Attendees: Personnel responsible for making travel arrangements and staff responsible for pre- and post review of travel documents.**

Session Length: 1.5 hours

**Workshop No. 160: Inventory Management**

Provides a comprehensive understanding on the requirements of the State of Hawaii's Inventory Management System. The PowerPoint 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.

Recommended Attendees: Personnel tasked with inventory management

Session Length: 2 hours

### **Workshop No. 165: Open Procurement Forum**

This session is not a formal presentation but is intended to give attendees an opportunity to discuss any procurement related concerns and/or issues with other attendees. One of the primary goals of this session is to allow for networking of agency procurement personnel to discuss procurement challenges that they have encountered and what, if any, solutions that was proposed and/or used for its resolution.

Recommended Attendees: Level 3

Session Length: as needed

### **Workshop No. 170: Overview of Procurement Practices - HRS Chapter 103D**

This session is mandatory for Executive State Department Directors, Deputy Department Directors and Heads of Administratively Attached Agencies given full procurement delegation from Department Heads; briefly review the history/background of the procurement code, organization, procurement delegations, source selection methods, SPO price lists and vendor lists, procurement circulars, procurement directives, and electronic postings, and provide examples, cover recent changes to HARs and HRS, and allow for questions from attendees.

**Mandatory Attendees: Levels 1 and 2**

Session Length: 2 hours

Not Intended for: Levels 3, 4, and 5

### **Workshop No. 171: Overview of Property Loss, Auto Accident, and Tort Claims**

This session provides an overview of the Statewide insurance program and the claim procedures for property losses, auto accidents and tort claims. It will also provide an overview of the Program's internet site at <http://hawaii.gov/dags/rmo>.

**Recommended Attendees: Levels 3 and 4**

Session Length: 2.5 hours

Not Intended for: Level 5

### **Workshop No. 175: pCard Overview and Updates**

This session is an overview of the pCard Program and procedures, including cardholder responsibilities, restricted purchases and blocked merchant category codes, dispute procedures, emergency pCard program, and security measures. Also includes program updates and future enhancements. This workshop is intended to supplement departmental required training on policies & procedures.

**Attendance: Highly recommended for all pCard holders**

Session Length: 1.5 hours

### **Workshop No. 176: pCard Program Changes and Updates**

The session is to discuss the status of the pCard program, security measures, ongoing implementation of CenterSuite, and other changes in the program. The Emergency pCard program advantages and benefits will be highlighted as well as the latest statistics and enhancements.

**Mandatory Attendees: Department pCard Administrators and Level 1**

Session Length: 1 hour

### **Workshop No. 180: Personal Services Contracting**

Understand and efficiently implement the procedures of the Personal Services Contractor Manual; including highlights:

- Understand DHRD's pre-approval requirements for required services.

- Understand B&F's pre-approval considerations for required services.
- Understand DAGS' employer-employee evaluation.
- Overview of SPO's procurement process used with personal services.
- Application of DAGS' contractor or payroll payment requirements.

**Mandatory Attendees: Level 2, 3, and 4**

Recommended Attendees: Personnel involved with the procurement of personal services.

Session Length: 1.5 hours

Not Intended for: Levels 5

**Workshop No. 185: Prevailing Wage, Certified Payroll and Contracting Agency Responsibilities**

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 topics covered in the class.

**Mandatory Attendees: Level 2, 3 and who have not attended the 2007 session.**

Recommended Attendees: Personnel involved with construction of public works projects

Session Length: 3 hours

Not Intended for: Level 5

**Workshop No. 186: Public Disclosure of Procurement Records**

The Office of Information Practices will conduct this session which will focus on public disclosure of procurement records under the State's public records law, the Uniform Information Practices Act (Modified). Topics that will be discussed include what information in procurement records must be disclosed and what is exempt from mandatory disclosure, when records must be disclosed during the procurement process, and the procedure for responding to records requests.

Recommended Attendees: Personnel involved with public disclosure of procurement records

Session Length: 2 hours

**Workshop No. 190: SPO Price and Vendor Lists/Cooperative Contracts**

An overview of the SPO price and vendor list contracts that provide purchases for a range of goods or services, and from multiple vendors; benefits of these lists, where are the listings located and how to use these contracts; completing an Evaluation: Vendor/Product form to obtain feedback from users. Briefing on 'cooperative contracts' that achieves cost effective and efficient acquisition of quality products and services by combining the purchasing power of the member states including county and municipal governments.

**Mandatory Attendees: Levels 3, 4 and 5**

Recommended Attendees: Level 2

Course Length: 1.5 hours

**Workshop No. 195: Surplus Properties****(To be held at DAGS Surplus Mapunapuna Warehouse)**

Learn about the Surplus Property program how to view current surplus items, details on the process to obtain state and federal surplus property. Understand how surplus property is obtained and where property is generated and the process that is followed for Surplus Property to acquire both State and Federal surplus property. Used vehicle purchasing from GSA fleet Management and different federal agencies. A tour of the warehouse and outside storage areas to obtain state and federal surplus property and become an eligible donee.

Session Length: 1 hour

**HePS (Hawaii Electronic Procurement System)**

### **Workshop No. HePS 100: HePS Basic User Training for Small Purchase Requests for Quotes (RFQ)**

A hands-on basic training for buyers who will be conducting small purchase request for quotes on HePS. Includes an overview of HePS, issuing a requisition/solicitation, choosing commodity codes, amending a solicitation, issuing an award, and searching the system for vendors, commodity codes, solicitations.

**Mandatory Attendees: Personnel who have been delegated the responsibility of conducting small purchase request for quotes on HePS for their department, division, branch or office.**

Recommended Attendees: Level 2, 3, 4 Approvers/Supervisors of HePS buyers

Session Length: 5.75 hrs

Prerequisites:

1. Completion of Workshop No. 120: Small Purchase;
2. Computer literate: use a mouse, find files on the computer or LAN, perform basic word processing, basic understanding of folders, subfolders and file extensions;
3. Basic knowledge of a browser such as Internet Explorer and the internet: identify the browser being used, enter web page addresses (URLs), knowledge of basic terms such as *menu*, *dropdown box*, etc.;
4. Approval by HePS department system administrator (password/login must be obtained from HePS Dept. System Administrator)

Not Intended for: Level 5; personnel issuing requests for quotes less than 4 times/year.

### **Workshop No. 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. This is a short training held at the end of every basic user training. Approvers are encouraged to attend basic user 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. This class will be taught at the end of each basic user class, as needed.

**Mandatory Attendees: Level 2, 3, 4 - who are supervisors of procurement personnel conducting small purchase request for quotes on HePS and will be issuing electronic approvals or purchasing personnel with approval responsibilities for small purchase request for quotes.**

Session Length: .5 hrs

Prerequisites:

1. Completion of Workshop No. 120: Small Purchases;
2. Computer literate: use a mouse, find files on the computer or LAN, perform basic word processing, basic understanding of folders, subfolders and file extensions;
3. Basic knowledge of a browser such as Internet Explorer and the internet: identify the browser being used, enter web page addresses (URLs), knowledge of basic terms such as *menu*, *dropdown box*, etc.;
4. Approval by HePS department system administrator (password/login must be obtained from HePS Dept. System Administrator)

Not Intended for: Level 4, 5

### **Workshop No. HePS 105: HePS Refresher Training for Buyers**

**Only** for buyers who have already taken the HePS basic user training and need a refresher on the basics.

Approximately 2 hours will be spent on refresher; the remaining time will be to address common problems. Bring your solicitation information for future solicitations you are planning.

**Mandatory Attendees: Procurement purchasing personnel responsible for conducting small purchase request for quotes on HePS for their division, branch or office and have not logged in to HePS for 3 or more months.**

Recommended Attendees: HePs buyers needing a refresher

Session Length: 3.25 hrs.

Prerequisites: Workshop No. HePS 100: HePS Basic User Training for Small Purchase Request for Quotes, Workshop No. 120: Small Purchases See also: Prerequisites for Workshop No. HePS 100

Not intended for: Level 5

### **Workshop No. HePS 110: Open Session: 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.

Recommended Attendees: Procurement purchasing personnel responsible for conducting small purchase request for quotes on HePS for their division, branch or office and approvers. this class is offered as needed.

Session Length: as needed

Prerequisites: Workshop No. HePS 100: HePS Basic User Training for Small Purchase Request for Quotes; Workshop No. 120: Small Purchases

Not intended for: Level 5

### **Workshop No. 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, using Vendor Questions and Answers, 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, and finding documents and awards.

Mandatory Attendees: **Procurement purchasing personnel responsible for conducting small purchase request for quotes on HePS for their division, branch or office and have issued 5 or more eRFQs on HePS.**

Recommended Attendees: Buyers who have issued at least 3 solicitations on HePS

Session Length: 5.5 hours

Prerequisites: Workshop No. HePS 100: HePS Basic User Training for Small Purchase Request for Quotes; Workshop No. 120: Small Purchases

Not intended for: Level 5

### **Workshop No. HePS 205: HePS Basics, Refresher and Beyond for Approvers**

Hands-on training in the basics of approvals, updates, areas to emphasize in your review based on a year of experience, questions and answers.

Recommended Attendees: HePS Approvers

Session Length: 2 hours

Prerequisites:

Workshop No. HePS 100: HePS Basic User Training for Small Purchase Request for Quotes (RFQ) training is preferable.

Not intended for: Level 4, 5

### **Workshop No. HePS 300: HePS Basic User Training for Competitive Sealed Bids (IFBs)**

A hands-on basic training for buyers who will be conducting invitations for bids on HePS. Includes an overview of HePS, issuing a requisition/solicitation, choosing commodity codes, amending a solicitation, issuing an award, and searching the system for vendors, commodity codes, solicitations. **Note:** Preference will be given to buyers conducting at least 4 competitive sealed bids per year.

Mandatory Attendees: **Level 2, 3 personnel who have been delegated the responsibility of conducting invitations for bids on HePS for their department, division, branch or office.**

Recommended Attendees: Level 2, 3, 4 Approvers/Supervisors of HePS buyers

Session Length: 5.75 hrs

Prerequisites:

1. Completion of Workshop No. 100 Competitive Sealed Bids
2. Computer literate: use a mouse, find files on the computer or LAN, perform basic word processing, understanding of folders, subfolders and file extensions;
3. Basic knowledge of a browser such as Internet Explorer and the internet: identify the browser being used, enter web page addresses (URLs), knowledge of basic terms such as *menu*, *dropdown box*, etc.;
4. Approval by HePS department system administrator (password/login must be obtained from HePS Dept. System Administrator)

Not intended for: Level 4, 5

### **Workshop No. HePS 350: HePS Basics and Refresher for System Administrators**

Hands-on training for department system administrators. Includes brief overview of HePS and overview of system administrator duties. Adding, modifying and de-activating buyers or approvers, adding/modifying delivery and

billing addresses; the basics of approval routing, finding documents.

**Mandatory Attendees: HePS system administrators who have not taken this training**

Recommended attendees: HePS system administrators needing a refresher

Session length: 3 hours

Prerequisites: This class is open only to HePS system administrators appointed by departments/jurisdiction .

Not intended for: Level 4, 5

### **HePS 450: HePS Beyond the Basics for System Administrators: 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 upcoming upgrade; questions and answers.

**Mandatory Attendees: HePS system administrators who have not taken this class.**

Recommended Attendees: HePS system administrators who need a refresher on reports and updates

Session Length: 3 hours

Prerequisites: This class is open only to HePS system administrators. HePS 350: HePS Basics and Refresher for System Administrators

Not intended for: Level 4, 5

## **Chapter 103F, HRS, Purchases of Health and Human Services**

### **Workshop No. 200: 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.

**Mandatory Attendees: Level 2, 3, 4 -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 and have not attended 2006 or 2007 sessions**

Recommended Attendees: Level 5: personnel who provide support for/assist in conducting procurements

Prerequisite: None

Session Length: 3 hours

### **Workshop No. 205: Planning, Using 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.

**Mandatory Attendees: Level 2, 3, 4 - Purchasing personnel, program managers/specialists, or other personnel involved in the planning, procuring or contracting for health and human services and have not attended 2006 or 2007 sessions.**

Prerequisite: Workshop No. 200: Basics of Procuring Health & Human Services

Session Length: 2 hours

Not Intended for: Level 5

### **Workshop No. 210: Treatment, Restrictive, Crisis and Small Purchase of Services, and Exemptions from HRS 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.

**Mandatory Attendees: Level 2,3, - Purchasing personnel, program managers/specialists, or other personnel involved in the planning, procuring or contracting for health and human services and have not attended 2006 or**

**2007 sessions.**

Recommended Attendees: Level 4; and supervisors of above personnel or responsible for approving procurements

Prerequisite: Workshop No. 200: Basics of Procuring Health & Human Services

Session Length: 3 hours

Not Intended for: Level 5

**Workshop No. 215: The Request for Proposals (RFP) Process for Health and 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.

**Mandatory Attendees: Level 2 and 3- Purchasing personnel, program managers or specialists, or other personnel involved in the planning, procuring or contracting for health and human services and have not attended 2006 or 2007 sessions.**

Recommended Attendees: Level 4; and supervisors of above personnel or responsible for approving procurements

Prerequisite: Workshop No. 200: Basics of Procuring Health & Human Services

Session Length: 3 hours

Not Intended for: Level 5

**Workshop No. 220: 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.

**Mandatory Attendees: Level 2 and 3 - Purchasing personnel, program managers/specialists, or other personnel involved in the planning, procuring or contracting for health and human services and have not attended 2006 or 2007 sessions.**

Recommended Attendees: Level 4; supervisors of above personnel or responsible for approving procurements

Prerequisite: Workshop No. 215: The Request for Proposals Process

Session length: 2.5 hours

Not Intended for: Level 5

**Course No. 225: Getting From a Notice of Award to An Executed Contract for Health and Human Services**

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.

**Mandatory Attendees: Level 2 and 3 - Purchasing personnel, program managers/specialists, or other personnel involved in the planning, procuring or contracting for health and human services and have not attended 2006 or 2007 sessions.**

Recommended Attendees: Level 4, supervisors of above personnel or responsible for approving procurements who have not attended 2006 or 2007 sessions

Prerequisite: Workshop No. 215: The Request for Proposals Process, Workshop No. 220: Evaluating Proposals Received in Response to an RFP

Session length: 3 hours

Not Intended for: Level 5

**Workshop No. 230: The SPO Website for Planning, Procuring and Contracting for Health and Human Services**

Review of SPO website and how to find what you are looking for. Overview of purpose and capabilities of the

contracts database reporting system (CDRS), request for proposals website (RFPW), Hawaii Compliance Express (HCE) and HePS, the Hawaii e-procurement System. Brief review of reports and search capabilities.

**Mandatory Attendees: 2, 3, 4, 5 -Purchasing personnel, program managers or specialists, or other personnel responsible for or assisting personnel responsible for procurements or contracts for health and human services pursuant to or exempt from Chapter 103F.**

Prerequisite: None

Course length: 2 hours

### **Workshop No. 235: Overview of Procurement of Health and Human Services for Directors**

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 only and is NOT for clerical staff.

**Mandatory Attendees: Level 1 - Directors, Deputy Directors, Executive Directors of state departments and administrative attached agencies contracting for health and human services.**

Prerequisite: None

Course length: 1.5 hours

Not intended for: Level 3, 4, 5 (please attend Course No. 200: The Basics of Procuring Health and Human Services for an overview)

### **Also required for Procurement of Health and Human Services:**

Course No. Workshop No. 135: Contract Administration

Course No. Workshop No. 145: Insurance Requirements for Contracts

### **Course No.250: Open Session: Procurement of Health and Human Services**

Open session for questions and answers, sharing experience, discussion of procurement issues, networking and lessons learned.

Recommended attendees: Level 3

### **POST (State Purchase of Service Team)**

The POST, a group comprised of various staff from all State departments that purchase health and human services, is open to all state staff involved in the planning, purchasing and contracting for health and human services. The State Procurement Office maintains an e-mail list and conducts meetings to coordinate various interagency activities for planning, procuring and contracting health and human services. Since July of 1998 the State Procurement Office, in conjunction with POST has collectively addressed issues to improve the State's ability to purchase quality services from the private sector. See more about past POST meetings.

Prerequisites: None

Recommended attendees: Level 2, 3

<b>Position Level Categories</b>		
Level 1	Procurement Officer (PO) by CPO Delegation	State and County Department Heads, Deputy Directors, Executive Directors, Heads of Attached Agencies
Level 2	Procurement Officer (PO) pursuant to a delegation by Head of the Purchasing Agency or serves as a final approver of procurements for all dollar amounts and source selection methods and exemptions.	Designated Procurement Officers, Administrative Services Officer, Fiscal Officer, Budget Officer, etc.
Level 3	Personnel whose responsibilities include more than 50% of procurement duties, or review, or conduct procurements for any dollar amount.	Departmental Contract Specialists, Purchasing and Supply Specialists, Purchasing Specialists, Program Managers,

		Program Specialists, etc. Professional Staff (Engineers, Biologists, etc.)
Level 4	Personnel whose responsibilities includes less than 50% of procurement duties, or may review or conduct procurements for specified dollar amounts.	Purchasing Technicians, Purchasing Clerks, Contracts Assistants, Program Assistants, Buyer, Storeskeeper, etc.
Level 5	Personnel who may assist with or conduct procurements for specified dollar amounts.	Clerical, Account Clerks, Fiscal Clerks, Secretaries, etc.