

COURSE SYLLABUS

Module A – Procurement 101

OVERALL PROGRAM GOALS

Procurement professionals play an integral role in all Public Agencies by providing oversight and support of the purchasing process, and assuring that the Agency follows all Public policies, rules, and regulations. The procurement professional also serves as a representative of the Public, and is responsible for safeguarding the Public from unethical behaviors related to purchasing.

The City of Los Angeles (City) employs over 500 individuals responsible for purchasing more than \$8 billion annually. The City does not currently have standard operating procedures or standardized professional development opportunities for their procurement professionals. This can be especially challenging for new and/or entry level staff that may have little familiarity with procurement or the City's procurement policies.

A professional development curriculum has been created for City procurement professionals to help elevate the capabilities of its procurement services. The goals of the program are to enhance the current abilities of all procurement professionals, improve confidence in their roles during the procurement processes, and to become more effective leaders during the purchasing and procurement process.



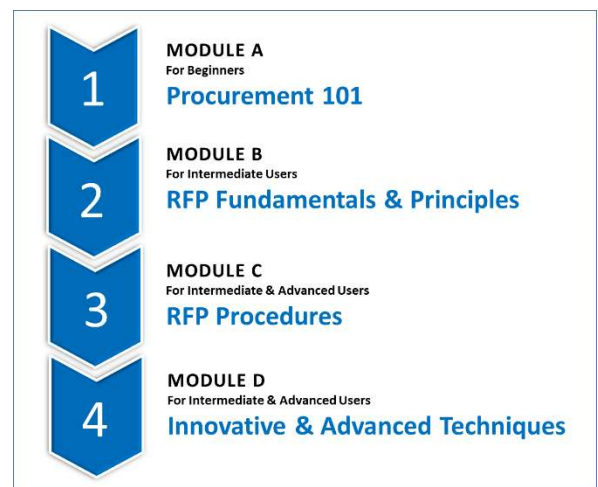
This professional development program is broken down into four modules:

Module A (Procurement 101) – Exposes new procurement professionals to the core procurement fundamentals and the most common types of procurement solicitations. This module serves to help prepare the Learner for the more advanced concepts, tools, and practices introduced in subsequent modules.

Module B (RFP Fundamentals) – Reviews the principles and fundamentals for preparing a successful RFP solicitation, including the scope of work, criteria and weights, administrative procedures, and submittal forms.

Module C (RFP Procedures) – Provides a step-by-step process of preparing, issuing, and administering an RFP, including advertising, receiving proposals, educating the evaluation committee, compiling results, administering the interview period, pre-contract negotiation and clarification, and debriefing procedures.

Module D (Innovative & Advanced Techniques) – Exposes procurement professionals to innovative and advanced procurement and RFP techniques that have been observed throughout the industry (both Public and Private procurement).



COURSE DESCRIPTION – MODULE A: PROCUREMENT 101

Procurement 101 introduces professionals to procurement principles and fundamentals, and is targeted for individuals with very limited experience in the public procurement field. The objectives of this module are to expose professionals to core procurement fundamentals and the most common types of procurement solicitations.

Learning Objectives

The primary module learning objectives are shown below, which will be achieved through assignments, activities, and a final assessment.

1. Identify and understand core public procurement fundamentals
2. Identify critical ethical policies that apply to procurements
3. Understand the primary differences between different types of procurement solicitations

GENERAL INFORMATION

Contact: John Savicky | 480-965-3033 | John.Savicky@asu.edu
Semester: Spring 2019
Website: www.simplar.com/cityofla
Password: Passwords will be provided upon registration
Books: There are no required textbooks for this class. All materials will be provided on the module page or emailed to the learners directly.

Instructors:

John Savicky | Researcher - Arizona State University (ASU)

John Savicky is a Senior Researcher at Arizona State University (ASU) and the Director of Sourcing Research at the Simplar Institute. He has 20 years of experience with running progressive and advanced procurement systems with Private, Public, Federal, and international organizations. His research processes have been implemented in IT, business services, and construction projects valued at over \$7 Billion with organizations such as: Google, United Airlines, Harvard University, General Electric, etc. John possesses a Bachelor of Science and a Master of Science degree in Construction and Facilities Management from Arizona State University. John has authored over 30 publications and has taught graduate courses on advanced procurement systems.

Kenneth Sullivan | Faculty - Arizona State University (ASU)

Kenneth Sullivan PhD is an associate professor in the School of Sustainable Engineering and the Built Environment at Arizona State University (ASU). He specializes in performance measurement, risk management, best value contracting, organizational transformation, and accountability systems. He has led project efforts in networking systems, software, campus dining, sports media rights, radio systems, furniture, health insurance, document management, construction services, and others. Kenn possesses a Bachelor of Science and a Master of Science degree in Civil and Environmental Engineering, an MBA in Real Estate and Urban Economics, and a PhD in Civil and Environmental Engineering, all from the University of Wisconsin – Madison. He has authored over 120 peer reviewed publications and was awarded the IFMA Educator of the Year Award.

Brian Lines | Faculty - University of Kansas (KU)

Brian Lines PhD is an assistant professor at the University of Kansas (KU) in the Civil, Environmental, and Architectural Engineering (CEAE) Department. Brian specializes in the areas of alternative procurement methods, expertise-driven project delivery, performance measurement, and program assessment. His research program actively integrates with organizations to transform their operations into more efficient and performance-driven environments. Brian's tools, templates, and approaches have been applied on more than \$1B in total project value and participating organizations have documented \$10's of millions in direct savings. Brian is also active in continuing education seminars/workshops for professionals internationally.

Kristen Hurtado | Faculty & Researcher - Arizona State University (ASU)

Kristen Hurtado PhD is an Assistant Research Professor at Arizona State University (ASU), in the School of Engineering. She specializes in RFP/solicitation optimization, project management, and planning. Over the past 9 years, Kristen has assisted Public and Private Organizations in accelerating their procurement innovation and construction approaches. She has managed over 200 projects (+\$1 Billion) with the US Government, State agencies, Universities, and Utilities. She's taught classes on Construction Delivery, RFP development and integration of best-value techniques. Kristen previously worked for Turner Construction Co., McCarthy Builders, and the Intel Corporation. She has conducted many workshops and conference presentations (ABA, IFMA, BOMA, USGBC, etc.). She has LEED AP and FMP certifications.



Jake Smithwick | Faculty - University of North Carolina in Charlotte (UNCC)

Jake Smithwick PhD is a faculty member at the University of North Carolina in Charlotte (UNCC). His research focuses on organizational performance benchmarking and optimizing project delivery within business services, facility management, and the broader built environment. His industry experience includes field inspection of nearly 2,000 waterproofing systems (74 million square feet) across the United States, and he spent six years in the US Air Force Reserve (civil engineering squadron). Dr. Smithwick possesses a Bachelor of Science in Computer Information Systems, a Master of Public Administration, and a Master of Science and PhD in Construction Management.




CLASS SCHEDULE

NOTE: All activities are posted online and contain additional instructions




Class 1 – Procurement Overview

-  Watch Video 1: Procurement Overview
-  Activity 1: Complete student bio & background and human dimensions





Class 2 – Core Procurement Fundamentals

-  Watch Video 2: Core Procurement Fundamentals
-  Activity 2a: Read Procurement Policies
-  Activity 2b: Complete the matrix on core procurement fundamentals

Class 3 – Role of the Procurement Agent

-  Watch Video 3: Role of the Procurement Agent
-  Activity 3a: Identify the most common reasons for vendor protests
-  Activity 3b: Read 3 protest letters and complete the assignment




Class 4 – Ethics

-  Watch Video 4: Ethics
-  Activity 4a: Read Ethics Policies
-  Activity 4b: Complete City of LA Code of Ethics review
-  Activity 4c: Locate, review, and submit a copy of your Agency's "Conflict of Interest" forms




Class 5 – Overview of Solicitations

-  Watch Video 5: Overview of Solicitations




Class 6 – The ITB Solicitation

-  Watch Video 6: The ITB Solicitation
-  Activity 6a: Review 3 sample ITB solicitations and complete ITB Matrix
-  Activity 6b: Locate and submit an ITB that your Agency has issued in the past



Class 7 – The RFP Solicitation

-  Watch Video 7: The RFP Solicitation
-  Activity 7a: Review & familiarize yourself with an RFP solicitation
-  Activity 7b: Locate and submit an RFP that your Agency has issued in the past

Class 8 – Sole Source Awards

-  Watch Video 8: Sole Source Awards
-  Activity 8a: Read Sections 6.000 and 6.301(c) of the FAR (provided online)
-  Activity 8b: Activity 8c: Locate and submit a copy of your Agency’s “Sole Source Award” policy.

Class 9 – Request For Information

-  Watch Video 9: Request For Information
-  Activity 9a: Locate and submit an RFI that your Agency has issued in the past.

Class 10 – Contracts vs Solicitations

-  Watch Video 10: Contracts vs Solicitations