

WORKSHOP

WHO: Anyone who Creates and/or Manages Contracts

WHAT: Critical elements of contract management, contract administration, contractual risks, risk mitigation, risks associated with solicitation types, roles and responsibilities of individuals involved in the contracting process, contract administration plans and performance assessment plans and their roll in contract management, documentation and record keeping, inspection and acceptance, rights and remedies. View the outline below.

Presented by:

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WHEN: Two Dates Available
Thursday, February 25 & Friday 26, 2010
Thursday, May 6 & Friday, May 7, 2010

WHERE: Western Reading Room
Patrick Henry Building
1111 East Broad Street
Richmond, VA 23218-1199

HOW: Register online at (Control +click to view link)
http://www.virginia.gov/conference/cgi-bin/conference.cgi?confer_id=395
Cost \$200.00

HOURS: 14 contact hours
VCA/VCO Two (2) Recertification Points

CONTACT: VIP at 804.225.4058 if you have any questions.

See below for the course outline-

Contract Management: Moving From Monitoring to Managing

Tentative Course Outline

DAY ONE:

Introduction

Understanding the Differences

Contract Administration
Contract Management

Procurement Planning

Pre-Class Assignment Review and Discussion
(Contract Awarded and Handed Over for Administration after Award)

Team Assignments

Distribution of Specifications to Teams
Specification Review by Teams

Introduction of Contract Administration Plan (CAP)

Distribute Contract Administration Plan Spreadsheet
Review Columns to be Completed
Complete Project Name, Date Project (specifications) Delivered to DGS,
and
Requested Project Start Date

Contract Administration Team Members

Team Members Identified and Role of Each Discussed
Contracting Officer (Agent, Buyer, Manager/Supervisor of
Procurement)
Contracting Officer's Representative (COR)
Subject Matter Expert
Quality Assurance Specialist
Reliability Engineer
Material and Services Price and Cost Analyst
Legal Counsel
Program Office Representative
On-Site Representative
Maintenance Engineer
Finance
Public Interest Groups
Political Appointees

**Teams Identify and Document Contract Administration Team Members
for Their Respective Projects**

Discuss Contract Goals

Identify and Document Contract Goals for Team's Respective Projects

Identify and Discuss Pre-Award Activities

Pre-Solicitation Meeting

Specification Review

Method of Source Selection (As Required by VPPA)

Small Purchase Procedures

Single Quotation

e-Mall Search Responses

Quick Quote

Small Purchase Charge Card

Competitive Sealed Bidding (The preferred method.)

Best Value Acquisition (BVA)

Competitive Negotiation

Sole Source

Emergency

Reverse Auctioning

Determining Pricing Structure for Solicitation

Determining Delivery Terms

Determining Method of Payment

Pre-Proposal Site Visit or Conference

Others?

Discuss Other Methods of Source Selection Recognized Nationally

Small Dollar/Purchasing Card

Emergency Purchases

Sole Source

Request for Quote (RFQ) (Telephone and Informal)

Invitation for Bids (IFB)/Invitation to Tender (ITT)

Request for Proposal (RFP)

Request for Information (RFI) or Request for Expression of Interest (REI)

Reverse Auction

Invitation to Negotiate (ITN)

Request for Supplier Qualifications (RFSQu)

Notice of Intent (NOI)

Identify and Document Pre-Award Activities for Team's Respective Projects

Determining Pricing Structure for Solicitation

Identify and Discuss Different Pricing Structures as Allowed under Agency

Procurement and Surplus Property Manual (APSPM)

Fixed Price Contracts

Firm Fixed Price

Fixed Price with Escalation/De-escalation

- Requirements-Type Contracts
- Time and Materials Contracts (T&M)
- Construction-Type Contracts
- Blanket Purchase Agreements (BPA)
- Cost Plus a Percentage of Cost
- Cost-Plus-A-Fixed-Fee

Other Cost-Type Contracts not identified in APSPM

- Cost-Sharing

Other Fixed-Price-Type Contracts not identified in APSPM

- Firm Fixed-Price
- Fixed Price with Economic Adjustment
- Fixed Price with Incentive
- Fixed Price with Re-determination

Determining Delivery Terms

Determine Who, What, When, Where and How Delivery will be Determined

Determining Method of Payment

- Lump sum payment
- Partial payment
- Progress or Milestone payments
- Advance payment
- Retainage
- Withholding Payment
- Prompt Payment Act
- Commercial Financing
- Assignment

Invoice Processing

Pre-Proposal Site Visit or Conference

Identify Potential Risks (Problems)

- Risk Management Planning
- Risk Identification
- Risk Qualification
- Risk Quantification
- Risk Response Planning
- Risk Monitoring and Control

Risk Classification (Facets)

- Technical (performance related)
- Programmatic (performance related)

Supportability (environment related)
Cost
Schedule

Identify Risk Level (1-5)

Probability of Occurrence
Impact of Severity of Consequences

Contract Terms and Conditions

General Terms and Conditions
Special Terms and Conditions

Identify Contract Monitoring Methods

Quality Assurance Plan
Sampling
 Simple Random Sampling
 Systematic Sampling
 Stratified Sampling
 Cluster Sampling
 Mechanical Sampling
 Convenience Sampling
Exception Inspections
After Delivery Inspections
In-Process Inspections
Final Inspection
Laboratory Testing

Contract Administrator

DAY TWO:

Critical Components to Monitor

Reporting Method and Frequency

Vendor Performance Complaints
Planning and Checklists
Procurement Records

Milestones for Measurement

Payment Terms

Review and Document on Contract Administration Plan

Post Award Activities

Appeals and Disputes
Goods Appeals

- Services Appeals
- Ineligibility
- Appeal of Denial of Withdrawal of Bid
- Determination of Non-responsibility
- Effect of Appeal Upon Contract
- Stay of Award During Protest
- Legal Actions
- Disputes
 - Claims
 - Claims Relief
- Alternative Dispute Resolution (ADR)
- Other Post Award Activities
 - Debriefing
 - Post Award Start Up Conferences
 - Site Visits
 - Contract Administration

Contract Modifications

- Bilateral Modifications
- Unilateral Modifications

Contract Close-Out Check List

- Administrative Issues
- Deliverables
- Payments and Invoices
- Accountability for Property
- Contract Files

Class Presentations of Contract Administration Plans for Project

Summary