

2013 UPPCC BODY OF KNOWLEDGE: CPPB

Periodically the UPPCC commissions a Job Analysis study to ensure that the certification exams are aligned with the skills, knowledge and abilities needed for successful job performance in the public procurement profession. The Body of Knowledge is the end result of the Job Analysis Study. A Job Analysis consists of several activities: the development of a survey tool, survey dissemination, compilation of survey results, and finally, the development of the Body of Knowledge.

The **Body of Knowledge for the CPPB** Certification was based on input from over 2,500 active public procurement professionals and consists of 61 total job tasks/responsibilities and 87 total knowledge statements representing common skills, knowledge and abilities that are essential to competent performance of **buyer level positions** within the public procurement profession.

Effective for the May 2014 testing window, the CPPB certification examination will cover all six domain areas listed below. The percentage of the exam that will come from each of the six domain areas is indicated by the percentage listed to the far right of each content domain heading. For example, 36% of the CPPB Exam will cover items listed under Domain II, while 8% of the exam will cover items from Domain VI.

I. PROCUREMENT ADMINISTRATION

20%

Knowledge of:

- A. common procurement performance measurement criteria (e.g. cycle time, inventory turns, customer satisfaction, number of disputes)
- B. automated procurement systems (e.g., electronic requisitioning)
- C. solicitation and contract file contents
- D. cooperative procurement programs
- E. value analysis (e.g., cost-reduction, cost avoidance, total cost of ownership)
- F. procurement audit and review processes
- G. purpose for department audits and reviews
- H. e-procurement programs
- I. supplier diversity programs (e.g., small, disadvantaged, minority-owned, women-owned, socio-economic business programs)
- J. sustainable procurement initiatives
- K. procurement policies and procedures (e.g., approvals, delegated level of signature authority)
- L. budgeting methods (e.g., performance based, zero based, line item)
- M. impact of budget cycle (e.g., lead times, receipt of goods, payment of goods)
- N. operational forms and templates (e.g., checklists, purchase orders, Request for Proposals boilerplate)
- O. procurement card programs
- P. process improvement programs (e.g., benchmarks, customer surveys)
- Q. standardization programs (e.g., materials, procedures, specifications)
- R. procurement trends
- S. procurement information resources (e.g., NIGP, Responsible Purchasing Network)
- T. professional values (e.g., ethics, guiding principles)
- U. outreach methods for internal and external stakeholders (e.g., tradeshow, training, networking, social media)
- V. team dynamics
- W. personnel management

Associated Tasks/Responsibilities:

1. design and maintain operational forms and templates (e.g., checklists, requisitions, solicitation boilerplate)
2. implement an automated procurement system (e.g., integrate business processes, interfaces)
3. implement a standardization process (e.g., materials, procedures, specifications, records retention/management)
4. implement operating work policies, guidelines, and procedures for the control of the department's workflow (e.g., training manuals, Code of Ethics, Standard Operating Procedures [SOP], process improvement)
5. interpret policies and procedures (e.g., apply policy situationally, respond to questions about policies and regulations)

6. establish cooperative procurement programs with other public agencies/private organizations
7. audit the procurement process (e.g., ratification process, confirming orders, identifying illegal purchases, unauthorized commitment)
8. manage purchasing department personnel (e.g., evaluate, counsel, discipline, coach)
9. train purchasing department personnel

II. SOURCING

36%

Knowledge of:

- A. product specifications, descriptions, and prices (e.g., order history)
- B. scope of work for service contracts
- C. benchmarking techniques and processes
- D. procurement methods and techniques (e.g., request for proposal [RFP], invitation for bid [IFB], best value)
- E. supply and demand concepts
- F. total cost of ownership concepts
- G. make, lease, or buy concepts
- H. market research resources
- I. roles and responsibilities in the procurement process
- J. special considerations for supplies (e.g., controlled goods, hazardous materials, material and inventory management, re-use and recycling)
- K. requisition approval process (e.g., funds availability, appropriate authorizations)
- L. laws, regulations, and ordinances
- M. specification requirements (e.g., completeness, accuracy)
- N. specification types (e.g., design, performance)
- O. contract types (e.g., blanket order, term contracts, incentive)
- P. contract terms and conditions
- Q. small dollar purchases (e.g., telephone quotes, fax quotes, e-mail, procurement cards)
- R. competitive sealed bids and proposals
- S. competitive negotiations
- T. supplier preference programs (e.g., local, small business, minority-owned, woman-owned)
- U. noncompetitive procurement (e.g., sole-source, single source)
- V. emergency procurement
- W. cooperative procurement (e.g., joint solicitation, piggyback)
- X. professional services procurement (e.g., architect and engineering, legal, physician, accounting, insurance)
- Y. construction procurement
- Z. pre-solicitation conferences
- AA. solicitation process (e.g., issuing solicitation, addenda, solicitation openings)
- AB. offer evaluation (e.g., responsiveness, responsibility, price analysis, cost analysis)
- AC. sources of services and/or supplies
- AD. methods of payment
- AE. payment types (e.g., progress, advance, retainage, incentive)
- AF. fair and open competition concepts
- AG. protest processes and procedures
- AH. hearing processes and procedures
- AI. debrief processes and procedures
- AJ. supplier requirements (e.g., space, delivery, industry standards)
- AK. contract document preparation
- AL. award recommendation process
- AM. contract approval process (e.g., legal, risk management, health and safety)

Associated Tasks/Responsibilities:

1. utilize an internal automated procurement system
2. utilize an e-procurement system
3. ensure compliance with supplier diversity policy (e.g., minority, women, small business, socio-economic, disadvantaged)
4. review procurement requests for compliance with established laws, policies, and procedures (e.g., bid thresholds, small business programs, completeness of specifications, available funds, appropriate approvals)
5. conduct market research to ascertain the use/availability of commercial items and services
6. make recommendations to requester regarding make, lease or buy decisions
7. obtain historical information for decision making (e.g., forecast estimated demand, sourcing, procurement)

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8. analyze economic conditions affecting specific procurements
 9. identify sources of services and/or supplies
 10. select method of procurement (e.g., small purchases, procurement card, competitive sealed bids, competitive proposals, cooperative purchasing)
 11. develop solicitation document (e.g., product specifications/scope of services, terms/conditions, performance period)
 12. review solicitation document (e.g., consistent language, no conflicting requirements)
 13. select contract type (e.g., blanket order, term contracts)
 14. solicit competitive quotes
 15. solicit competitive sealed bids/tenders
 16. solicit competitive sealed proposals
 17. ensure a transparent solicitation process that provides for open and fair competition
 18. identify evaluation methodology/criteria and select team
 19. conduct pre-bid or pre-proposal conferences
 20. prepare and issue addenda
 21. analyze and evaluate solicitation responses (e.g., responsiveness, responsibility)
 22. prepare and make recommendation for award
 23. respond to protests and inquiries (e.g., procedure, process, hearings)
 24. select payment methods and options
 25. review supplier samples and/or demonstrations with the buying organization management and/or customer departments
 26. prepare and execute contractual documents (e.g., contract, award letter, acceptance agreement, purchase order)
 27. conduct post-award respondent debriefing
 28. mitigate risk through development of terms and conditions

III. NEGOTIATION PROCESS

8%

Knowledge of:

- A. negotiation strategies and techniques (e.g., conflict resolution)
- B. problem-solving and decision-making techniques and processes
- C. negotiation process and documentation requirements

Associated Tasks/Responsibilities:

1. select negotiation team members and assign roles
2. prepare negotiations strategies (e.g., goals, outcomes, tactics, positions)
3. conduct negotiations (e.g., pricing, terms, renewals, best and final offer, best alternative to a negotiated agreement)
4. document negotiation process and results

IV. CONTRACT ADMINISTRATION

20%

Knowledge of:

- A. techniques to ensure supplier compliance to specifications (e.g., receipt inspection, site visits, item sampling/testing)
- B. techniques to evaluate supplier performance
- C. elements of a contract
- D. contract management (e.g., performance, ongoing risk)
- E. contract performance deficiencies, disputes, and resolutions (e.g., notice to cure, liquidated damages)
- F. contract modifications (e.g., change orders, amendments, escalation)
- G. contract termination (e.g., default, convenience, non-appropriation)
- H. contract renewal process
- I. contract close-out (e.g., substantial completion, service transition, lien waivers)

Associated Tasks/Responsibilities:

1. conduct a post-award start-up conference
2. evaluate contractor/supplier performance (e.g., quality control)
3. monitor contractor/supplier compliance (e.g., insurance requirements, licensing and bonding requirements, prevailing wage, warranties)
4. modify contracts
5. remediate contractor/supplier non-compliance (e.g., cure notice, show cause notice)

6. resolve contract disputes
7. terminate contracts (e.g., default, convenience, non-appropriations)
8. conduct contract closeout activities

V. SUPPLY MANAGEMENT

8%

Knowledge of:

- A. ordering process (e.g., route, expedite, follow-up)
- B. inventory management techniques and principles (e.g., Just In Time, min/max levels, Last In First Out, First In First Out)
- C. disposition of obsolete and surplus equipment and materials
- D. asset management
- E. supply chain management

Associated Tasks/Responsibilities:

1. follow-up and expedite orders
2. resolve delivery and receiving problems

VI. STRATEGIC PROCUREMENT PLANNING

8%

Knowledge of:

- A. analytical techniques (e.g., Pareto analysis)
- B. research techniques
- C. forecasting techniques and strategies
- D. procurement strategies based on forecast data, market factors, and economic trends
- E. strategic planning
- F. cost/benefit analyses on future acquisitions
- G. contingency/continuity of operations plan (e.g., disaster preparedness)
- H. succession planning

Associated Tasks/Responsibilities:

1. establish the mission statement, vision, and operating values of the procurement department
2. uphold and promote the mission, vision, and values of the procurement department (e.g., ethics, diversity, professionalism, accountability)
3. conduct value analysis (e.g., cost-reduction, cost avoidance, total cost of ownership)
4. implement goals, objectives, and measurement criteria for procurement department
5. monitor professional and legislative trends and laws (e.g., rules, regulations, executive orders)
6. analyze economic trends and conditions that affect procurement
7. conduct cost/benefit analyses on future acquisitions
8. implement a process improvement plan (e.g., stakeholder satisfaction, remediation)
9. plan and implement procurement strategies and objectives based on forecast data, market factors, economic trends, and customer needs (e.g., strategic sourcing, staffing)
10. formulate a procurement contingency/continuity of operations plan (e.g., disaster preparedness, supply chain)