

LTAP

Local Technical
Assistance Program

Presented by WSDOT's Highways & Local Programs LTAP Center
and the
Municipal Research and Services Center of Washington

Purchasing, Bidding and Contract Management for Local Agencies

September 21-22, 2011 (#1961)
Ellensburg

Central Washington University
Mary Grupe Center
910 N. Walnut St., Ellensburg, WA 98926
(509) 963-1321*

November 16-17, 2011 (#1962)
Tacoma

Pierce County – Mall Plaza Building
Conference Room – 2nd Floor
2702 S. 42nd St., Tacoma WA 98409
(253) 798-7172*

(*The phone numbers above may be used in case of emergency to contact a student in the class. These are reception numbers.)

Cost: \$100

Class Size: 45

A two-day course (12 hours)

Times: Day 1 – 8:30 am to 4:00 pm (registration opens at 8:00 am)

Day 2 – 8:30 am to 4:00 pm (registration opens at 8:00 am)

Target Audience

Public Works Directors

City/County Engineers

Project Managers

Inspectors

Contract Managers

Purchasing Agents

Office Managers

City Clerks

Administrative Assistants

Consulting Engineers

Project Engineers

Finance Directors

Course Description

Local agencies must purchase supplies, materials and equipment, solicit services and contract for public works in accordance with confusing and ever changing state statutes and regulations. The Washington State LTAP Center and MRSC offer this fast-paced workshop to all local agencies and municipal governments to help them spend scarce dollars in accordance with state statutes and to improve their project and contract management skills. Attendees will take home handouts covering a wide range of purchasing, bidding and contract management issues and will gain access to a whole bunch of useful online resources that include sample and model documents. The Sourcebook is on-line at [Purchasing, Bidding, and Contract Management Sourcebook](#).

Instructors John Carpita, MRSC, Tracey Dunlap, City of Kirkland, and Mike Purdy, Michael E. Purdy Associates, have revamped this popular course to make it more interactive and scenario based, with time to discuss "hot" topics of interest to attendees. To this end, attendees are strongly encouraged to email their "hot" topics to John Carpita at icarpita@mrsc.org before the workshop.

Agenda

Day 1: Purchasing, Bidding, and Service Contracting

- A quick, but thorough, review of purchasing and bidding statutes that affect local agencies as they purchase goods, materials and services and contract for public works.
- An in-depth look at special purchasing issues such as intergovernmental purchasing (piggybacking), sole source purchases, and special market/facility conditions.
- Purchased, personal and professional service contracting.
- “Hot” topics as defined by attendees,

Day 2: Public Works Contracting

- Public works overview, including definitions, maintenance/ordinary maintenance contracts, bid limits, sales and use tax issues, and prevailing wages.
- “Hot” topics as defined by attendees,
- Project delivery methods, including day labor, on-call contracts, small works roster, and alternative public works procedures.
- Insurance, bonding, and retainage requirements.
- Responsible bidders and responsive bids.
- Construction contract documents.
- Claims and change orders.
- Contract closeout and claims against bonds and retainage.

Instructors

John Carpita, PE, Public Works Consultant, Municipal Research and Services Center (MRSC), Seattle. John Carpita joined MRSC in January 1996. He has a B.S. and a M.S. degree in Civil Engineering from Montana State University. A registered professional engineer since 1972, he is currently registered in Washington. John has had a widely varied 41 year career as a consultant, county engineer, city engineer, and project manager. With MRSC, John is a resource for engineering design, purchasing and bidding issues, construction contract issues, local improvement districts, sewer, water, storm drainage, and solid waste issues.

Tracey Dunlap, P.E. Director of Finance & Administration, City of Kirkland.

Prior to joining Kirkland in 2006, she was a principal and shareholder in FCS Group, a regional financial and management consulting firm (14 years). An industrial engineer registered in the state of Washington, she has worked with jurisdictions throughout the Northwest to develop and implement cost recovery and fee strategies, set utility rates, and improve organizational efficiency and effectiveness. Tracey's experience also includes working for a large defense contractor (5 years) and a major financial institution (3 years). She has presented on a wide array of topics for organizations including WFOA, APWA, APA, WABO, and AWC.

Mike Purdy, Principal, Michael E. Purdy Associates

After more than 30 years as a contracting and procurement manager for large government agencies in Seattle, Mike Purdy retired in February, 2010. In his retirement, Mike remains active in contracting and legislative issues as the principal of Michael E. Purdy Associates (www.mpurdy.com), a consultant firm he established in 2005 to help public agencies and businesses navigate through the complexities of public contracting issues. He is a frequent trainer and speaker for public agencies and industry associations. He also maintains the popular Public Contracting Blog at <http://PublicContracting.blogspot.com>, designed to keep government agencies, contractors, and consultants up-to-date on key developments in contracting. Mike began his career with the City of Seattle, where he was the City's Contracting Manager. After more than 21 years with the City, he served for five years at the Seattle Housing Authority as Contracting and Procurement Manager. Before his retirement, he was the Contracts Manager for the University of Washington's capital projects office, where he was responsible for managing design and construction contracts for more than \$1 billion worth of public works projects. Mike has a bachelor's

degree in business and public administration and an MBA, both from the University of Puget Sound, and a master of divinity degree from Fuller Theological Seminary.

Certification Program: The workshop is eligible for 12 hours of credit towards a CASC certificate. (see <http://www.apwa-wa.org/committees/2010%20CASC%20Brochure.pdf>) in the APWA – MRSC Public Works Contracting Training and Certification Program. For more information on the program, jointly sponsored by MRSC and the American Public Works Association Contract Administration Subcommittee, contact John Carpita, Public Works Consultant, MRSC at (206) 625-1300.

Registration

Please register online using this link: [On-line Registration Form](#). Or key this web address into your browser: <http://eefmapps.wsdot.wa.gov/fmi/xsl/LTAPTraining/default.xsl> Fill in the requested information, select a class from the list, and “Submit.” A notice with driving directions to the training site will be e-mailed to you when we process your request. If you do not receive this notice within a few days, you may not be registered and should contact us.

Please do not prepay; an invoice will be sent to you after the class. Confirmation letters are mailed two weeks prior to the class. If you are unable to attend, someone else from your agency may attend in your place.

Questions

Contact Judy McDonald at (360) 705-7809 or McdonJT@wsdot.wa.gov for questions on this training, for registration assistance or cancellations.

(Disability accommodations provided upon request.)

Visit the
Washington State LTAP Center Web Page
<http://www.wsdot.wa.gov/LocalPrograms/Training/default.htm>