

Subject: TRAINING REQUIREMENTS FOR PROJECT OFFICERS  
AND TECHNICAL PROPOSAL EVALUATORS

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**8-96-00** PURPOSE

This chapter provides policies and procedures concerning training requirements, for Departmental project officers and technical proposal evaluators representing program offices involved in fulfilling mission needs and program requirements through the use of the contracting process.

**8-96-10** BACKGROUND

- A. The Secretary's memorandum of **May 18, 1977**, entitled "**Actions Required to Correct Major Deficiencies in the Contracting and Grant Processes**," set forth a plan of action to improve the efficiency, effectiveness, and integrity of the Department's contracting process. As part of this plan, an intensive Department-wide training program was developed for project officers, technical proposal evaluators, and other key program officials to explain their role in the contracting process and their interrelationship with the contracting officer. The project officer training program was later updated and expanded to meet the requirements of Executive Order 12352 on Federal Procurement Reforms, dated March 17, 1982. **DHHS** now offers a "**Basic Project Officer**" course, "**Advanced Project Officer**" course, "**Basic Project Officer - ADP**" course, "**Advanced Project Officer - ADP**" course, "**Basic Project Officer - Architect/Engineer**" course, "**Basic Project Officer - Research & Development**" course, and four "**Writing Statements of Work**" courses (covering non-research & development, research & development, construction/architect & engineer, and supplies and services). Descriptions of the courses can be found in the "**DHHS Acquisition Training & Certification Program Handbook**". The Department will revise or add courses, as appropriate, to ensure that this program continues to **be of** the highest quality.

- B. While the objective of the training program is to improve technical input into all phases of the contracting process, special emphasis has been placed on the proper development of the contract statement of work, the technical evaluation process, and the contract monitoring process, to ensure that the Department's needs and interests are adequately specified and protected and that contracts are properly performed.

8-96-20 POLICY

It is the Department's goal to have all program personnel involved in the contracting process successfully complete the appropriate "Basic Project Officer" course, before assuming the responsibilities of, and serving as, project officers or technical proposal evaluators. Specifically:

- A. At least fifty percent of the DHHS program personnel, performing the function of technical proposal evaluator on a technical evaluation team or panel for any competitively solicited DHHS contract, shall have successfully completed the appropriate "Basic Project Officer" course, or an equivalent course (see paragraph C, below), as appropriate. This requirement applies to the initial technical proposal evaluation and any subsequent technical evaluations that may, be required.
- B. All program personnel selected to serve as project officers for DHHS contracts shall have successfully completed either the appropriate "Basic Project Officer" course, or an equivalent course (see paragraph C below).
- C. Determination of course equivalency shall be made by the Principal Official Responsible for Acquisition of the cognizant procuring activity. The contracting officer is responsible for ensuring that the project officer and technical proposal evaluators have successfully completed the required training.

**8-96-30. EXCEPTIONS**

**A. Small Contracting Activities.**

1. Program personnel designated to serve as project officers and technical proposal evaluators, for contracts originating in offices having a mission which only incidentally and infrequently involves the generation of contract requirements (i.e., normally less than three contract requirements per fiscal year and in an amount not exceeding \$100,000 per contract), are not required to have completed any of the Department's training courses (although completion of an appropriate "Basic Project Officer" course is recommended).
- 2: As a substitute for the training, contracting officers servicing these program offices are required to ensure, as a minimum, that program personnel designated to serve as project officers and technical proposal evaluators have read and studied the "DHHS Project Officers! Contracting Handbook", and fully understand their responsibilities. The contracting officer shall require these program personnel to furnish written certifications that they have fulfilled this requirement, prior to discharging the duties of project officer or technical proposal evaluator.

**B. Urgent Requirements.** In the event there is an urgent requirement for a specific individual to serve as a project officer and that individual has not successfully completed the appropriate "Basic Project Officer" course, the Principal Official Responsible for Acquisition may waive the training requirement and authorize the individual to perform the project officer duties, provided that:

1. The individual first meets with the cognizant contracting officer, to review the "DHHS Project Officers' Contracting Handbook" and to discuss the important aspects of the relationship between the contracting office and program office, as appropriate to the circumstances: and
2. The individual attends the next scheduled and appropriate "Basic Project Officer" course.

8-96-40 COURSE PREREQUISITES

A. Project Officers

1. Newly appointed project officers, and project officers **with** less than three years experience and no previous related training, are required to take the appropriate **"Basic Project Officer"** course. (The grade level for **project** officers attending the course should be GS-7 and above). All project officers are encouraged to take the appropriate **"Writing Statements of Work"** course.
2. Project officers with three years or more experience, and **project** officers with less than three years experience who have successfully completed the appropriate basic course, are qualified (and encouraged) to take the **"Advanced Project Officer"** course.
3. Additional information on prerequisites for attendance of **these** courses may be found in the **"DHHS Acquisition Training & Certification Program Handbook"**.

B. Technical Proposal Evaluators Technical proposal evaluators, regardless of experience, are required to take the appropriate **"Basic Project Officer"** course. Upon successful completion of the basic course, it is recommended that they take the appropriate **"Advanced Project Officer"** course.