

CONTRACT SPECIALIST (CS)

TRAINING BLUEPRINT

September 2004

Updated through [FAC 01-24](#)



Federal Acquisition Institute
Office of the Chief Acquisition Officer
General Services Administration

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CS TRAINING BLUEPRINT

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Section 1. Introduction

Overview and Purpose

Contract Specialists (CSs) serve the federal government as business leaders, helping to ensure government-contractor business relationships are mutually beneficial and provide exactly those products and services the government needs.

The changing nature of acquisition work places significant importance on CS activities. It is essential that all CSs understand their responsibilities and are provided with appropriate support, training experiences, and developmental tools to effectively perform these responsibilities.

Why this Workbook?

As articulated in Section d(3) of the Office of Federal Procurement Policy Letter No. 97-01, this Workbook provides the foundation for all CS training and developmental activities. Uniform use of this Workbook ensures consistency in acquisition activities across federal agencies and departments.

Towards a Results-Oriented View of the Acquisition Process

CSs sit in the center of a multi-pronged acquisition process, with stakeholders distributed across departmental lines as well as within and outside the federal government. Several changes have occurred to present CSs with a vibrant, challenging acquisition environment in which to contribute.

Acquisition reforms, technology-driven changes in work processes and communication, competition for acquisition work, and the focus on leveraging acquisition to achieve mission-relevant outcomes are driving new ways of doing business in the federal government. Historically, agencies and acquisition professionals have approached procurement and contracting from a process-based perspective. Legislation was then enacted that affected the nature of tasks performed by the acquisition workforce. The 1993 Government Performance and Results Act, (GPRA), the 1994 Federal Acquisition Streamlining Act (FASA), and the 1996 Clinger-Cohen Act, moved the government toward acquiring services and products against established performance measures and outcomes.

Today, acquisition contributors are responsible for the entire business cycle, from using relevant marketplace knowledge to inform strategy and planning activities to managing contractor performance and maintaining useful business relationships into the future. Successful acquisitions now require a fresh, results-oriented view of the process with acquisition professionals serving as business advisors to their respective agency stakeholders. A key guiding principle for any acquisition contributor is to develop a sound business solution that links short- and long-term goals.

Creating High Performing CSs

This section outlines key information intended to serve as a foundation for role/responsibility discussions among CSs, Contracting Officers and other supervisors and stakeholders (as applicable). These discussions will help ensure all parties build a common perspective about the knowledge, skills, and abilities (i.e., competencies) required. This unified view can help determine the training and developmental activities most likely to create high-performing CSs. Both future CSs and their Contracting Officers (and other supervisors) benefit when targeted and valuable training and/or developmental experiences are selected.

Core Capabilities

The acquisition career model, as articulated by the Federal Acquisition Institute (FAI), offers advice on how to develop the skills and capabilities necessary for effective performance of acquisition roles (including the CS role). At the heart of the acquisition career model are nine (9) core capabilities:

- Develop, negotiate and manage business deals
- Communicate effectively
- Manage and lead change
- Solve problems in an ambiguous environment
- Analyze and understand the marketplace
- Build and manage relationships across functions and organizations
- Understand and effectively operate in the customer environment
- Develop and implement outcome oriented solutions
- Execute.

Each CS will, in due course of his/her training and progressive work responsibilities, have the opportunity to build and strengthen these core capabilities. Ultimately, each CS will perform as a fully effective acquisition contributor.

Key Competencies

FAI has identified an initial set of competencies essential for effectively performing CS duties. (Competency definitions are included in Section 4.) Using these competencies as the foundation for all CS-related work accomplishes several objectives. First, it unites all parties on the acquisition contributor's central "business advisor" role and subsequent responsibilities. Second, the focus on training and development of these competencies can help manage individuals' acquisition careers. By reinforcing the need for business acumen, customer service, flexibility, leadership, and integrity through these competencies, the adoption of a results-oriented approach to acquisition and the attainment of business goals can be more easily accomplished.

Section 2. Instructions for Contracting Officers (and other CS Supervisors)

How to Use this Workbook

This workbook is designed to help you in selecting, evaluating and documenting training and developmental activities for individuals assuming the role of CSs.

Recommended Uses

The following list provides recommended uses of this Workbook:

- Organization: Keep one master office copy of the Workbook for your own use.
- Currency: Check FAI's website (www.fai.gov) every six months to ensure you are using the most current version of this Workbook. If a new version is issued, replace your old copy.
- Communication: As each individual assumes the role of CS, provide a Workbook to that person upon the commencement of their designation and emphasize the value of using the Workbook as a basis of facilitating excellence in CS duties.
- Acquisition: During initial orientation conversations with any new CS, use the content located in Section 1 that discusses the current perspective towards acquisition and the associated key roles played by high performing CSs as a basis for your discussions.
- Consistency: Follow the instructions for conducting the CS Training Interview *each time* you engage in an interview to ensure you provide consistent, thorough attention to each person.
- Documentation: After the CS Training Interview is completed, use Section 5 to store separate forms for each CS.
- Records: Whenever a CS participates in a training or developmental activity, record the outcome on the appropriate form and store the most current version in Section 5.

The CS Training Interview

This section provides step-by-step guidelines for how you and your potential CS collaboratively identify those duties for which a training need exists. Additionally, the interview provides a forum to identify training and developmental opportunities to address those needs.

How to Conduct the Interview

Follow these steps when conducting the CS Training Interview:

Step 1. Schedule the Interview.

As soon as you know the person who is designated to be CS, make initial contact with that person and arrange a day, time and location for the interview. Ideally, the interview should be scheduled as soon as possible, providing two or three days for each party to prepare. This preparation time allows the designee to familiarize him/herself with the CS Training Interview Report form and collect any necessary materials (i.e., prior training certificates), as well as allows you to review the core capabilities and responsibilities associated with this role. Please allow at least one hour for the interview and arrange to hold the interview in a private location where you will not be interrupted.

Step 2. Describe the Purpose of the Interview.

Clearly articulate your responsibility is to do all you can to ensure the CS is successful at his/her job. Emphasize that the purpose of the interview is to identify the appropriate training experiences and developmental tools that will permit the individual to effectively perform CS responsibilities.

Step 3. Perform a High-Level Review of the Procurement Process.

Use the Chart of the Procurement Process document (included in Section 4 of this document) to structure a high-level review of the process. Highlight the area in which your agency or department the CS has critical responsibility. Tie effective performance of CS activities to the attainment of agency or department business objectives.

Step 4. Identify CS Duties.

Review the duties to be performed by the CS and identify the corresponding Units of Instruction relevant to each duty.

Step 5. Review CS Duties to Assess Proficiency.

Interview the employee to determine his/her current proficiency at performing applicable duties as represented by various "Units of Instruction" located in Section 6 of this Workbook. Also identify relevant coursework or certifications already completed by the employee. Use the Statement of Completion contained in each Unit to document completion of each Unit by recording the evaluator's name, title, and date as indicated. File a copy of all Statements in Section 5 of your Workbook and give a copy to the CS. Document these interview discussions and ensuing evaluations on the "Interview Summary Report" form (located in Section 4 of this document) and file it in Section 5 of your Workbook copy.

Step 6. Prescribe Training and/or Developmental Activities.

Based on those competencies, knowledges and skills the individual needs to develop, select training and/or developmental activities appropriate to fulfill those needs. Refer to the Federal Acquisition Institute's (FAI's) website for a "catalogue" of suggested training and development activities.

Step 7. Ensure CS Has Necessary Support for Training.

Speak with all necessary stakeholders (i.e., acquisition office members) and ask them to help you support the new CS in his/her training and initial job performance. Make sure the new CS knows you take your responsibility to provide him/her support seriously. Begin to create bi-directional communication patterns, a fluid partnership and an overall climate of support for training and development with your actions and words.

Step 8. Reward Full Competency.

When the employee has completed all training in the IDP, consider awarding a certificate to the employee or otherwise provide recognition for this accomplishment.

As you perform the interview, keep in mind the following tips for avoiding some common interviewing pitfalls:

- Avoid allowing the things you hear early in the interview to distort how you listen to and perceive information later in the interview.
- Listen carefully throughout the interview.
- Do not ask vague questions – you are more likely to get low quality answers.
- Do not ask "leading" questions, or questions that direct or subtly sway the respondent.

- Make sure to explore an interesting answer until you are certain you understand every point the individual intended to communicate.
- Accurately and comprehensively record the interview incrementally – do not wait until the end to take notes.

How to Use CS Interview Materials

Quick Reference List

Below is a quick reference list to guide use of CS materials before and after the interview.

- Interview Steps: Familiarize yourself with the steps outlined in the previous portion of this section. Refer to these steps during the interview to make sure you follow the prescribed steps.
- Chart of the Procurement Process: Use this document, an overview of the Federal Procurement Process, as a tool for orienting newly designated officials. A copy of this process chart can be found in Section 4 of this Workbook.
- Section 1 Content: Use the content from this section (i.e., a results-oriented view of acquisition) as a foundation for your discussions with newly designated individuals.
- CS Competencies: Use the list of competencies and definitions to become aware of the wide range of competencies that are instrumental when performing CS duties. A copy of this list can be found in Section 4 of this Workbook.
- Interview Summary Report: Use this document when interviewing individuals and later to identify all areas indicating a lack of training or experience and each recommended activity to meet that need. A blank copy of this report can be found in Section 4 of this Workbook.

Section 3. Instructions for Contract Specialists (CSs)

How to Use this Workbook

This Workbook is designed to help you in performing your Contract-related duties and documenting on-the-job and training efforts.

Recommended Uses The following list provides recommended uses of this Workbook:

- **Orientation:** Use this Workbook to familiarize yourself with the kinds of duties and activities you will perform as a CS. Become familiar with the steps of the Procurement Process (the chart summarizing this process is located in Section 4). Begin to create an atmosphere of open dialogue about how to best perform these duties and continuously improve your contributions.
- **Acquisition:** During your initial orientation conversations with your Contracting Officer (or other supervisor), use the content located in Section 1 of this Workbook that discusses the current perspective towards acquisition as input into your discussion.
- **Documentation:** After participating in the CS Training Interview, keep a copy of all necessary forms in Section 5.
- **Records:** Whenever you participate in a training or developmental activity, work with your Contracting Officer (or other supervisor) to record the outcome on the appropriate form and store the most current version in Section 5.

Performing the CS's Key Business Leader Role

The movement towards a results-oriented view of the acquisition process requires CSs to assume a key business leader role. The approach you take as you perform your CS responsibilities can help you succeed if you transcend a process-oriented view of acquisition activities (i.e., policing the adherence to mandated steps). All CSs are instrumental in developing and maintaining healthy business relationships between contractors and federal agencies. This focus extends beyond the lifecycle of a given contract; it is helpful to work with your Contracting Officer, program manager, and other acquisition professionals to understand how the specific contract you service fits into the larger agency mission and business objectives.

Adopting a Business Leader Mentality

Several concepts are helpful to keep in mind as you assume this important position:

- Transcend the Contract Lifecycle: It is essential that you approach your job with a perspective that extends beyond a single contract lifecycle. Remain aware of how your actions influence your department or agency's attainment of its mission objectives.
- Documentation is Key: What may feel like straightforward, routine tasks of monitoring and documenting contract project activities are in the end, that which ensures the success of any contract.
- Maintain Open Communication: Use multiple strategies (i.e., email check-ins, phone calls, regular status reports, site visits) to encourage and maintain bi-directional, open communication. Make it easier for a project team member to reveal rather than withhold information about a potential problem.

The CS Training Interview

This section provides step-by-step guidelines of how you can prepare for and participate in the CS Training Interview. Federal departments and agencies are developing comprehensive curricula to systematically develop competency at performing CS duties and tasks. The goals of training are to ensure that all newly hired or appointed CSs:

- Complete the curriculum required by the employing department or agency

- Apply and reinforce skills and knowledge learned in the classroom or through on-the-job work assignments

How to Participate in the Interview

Follow these steps when participating in the CS Training Interview:

Step 1: Prepare for the Interview.

As soon as you and your Contracting Officer (or other supervisor) schedule the interview, begin to familiarize yourself with this Workbook and all materials located in Section 4. Inspect the Interview Summary Report, the Chart of the Procurement Process and the list of CS Competencies. Also, scan the units of instruction (Section 6) to become generally familiar with the kinds of tasks included. Make notes about those competencies and tasks you: (a) are very certain you have proficiency, (b) are somewhat certain you have proficiency, and (c) are unsure whether you have or do not have proficiency. Gather together any documentation (i.e., training completion certificates) that will demonstrate your prior experience and/or training.

Step 2: Discuss the Purpose of the Interview.

Review with your Contracting Officer (or other supervisor) the purpose of the interview, including how your success will be a function of the experience you bring “to the table” combined with the training and developmental experiences identified during the interview and support received by stakeholders.

Step 3: Review CS Duties to Assess Proficiency.

Move through each applicable duty (as represented by various “Units of Instruction” located in Section 6 of this Workbook), determining your proficiency at performing each duty. Identify relevant coursework or certifications you have already completed. Work with your Contracting Officer (or other supervisor) to accurately document your interview discussions and ensuing determinations on the “Interview Summary Report” form (located in Section 4 of this document). Use this report to identify duties that the employee is already competent to perform. An employee may not need on-the-job or classroom training in a duty if: (1) the employee has performed the duty, and (2) the employee’s supervisor is satisfied that the employee can satisfactorily perform the duty. File a copy of this form in Section 5 of your Workbook.

Step 4: Plan Training and/or Developmental Activities.

Based on the competencies, knowledges and skills you need to develop, select training or development activities appropriate to fulfill those needs. In collaboration with your Contracting Officer (or other supervisor), consult FAI's website for a "catalogue" of suggested activities.

Step 5: Ensure You Receive Necessary Support for Training.

Speak with your Contracting Officer (or other supervisor) about the kinds of support you believe you will need to effectively participate in training and bring new knowledge back to your job. Reinforce your interest in building those skills you need to excel as a CS business leader.

How to Use CS Interview Materials

Quick Reference List

Below is a quick reference list to guide use of CS materials before and after the interview.

- Chart of the Procurement Process: Use this overview of the Federal Procurement Process as a tool to become familiar with the process that will underlie your work as a CS. A copy of this process chart can be found in Section 4 of this Workbook.
- Section 1 Content: Use the content from this section (a results-oriented view of acquisition) as a foundation for your discussions with newly designated individuals.
- CS Competencies: Use this list and definitions to become aware of the wide range of competencies that are instrumental as you perform your CS duties. A copy of this list can be found in Section 4 of this Workbook.
- Interview Summary Report: Use this document during your interview to identify all areas indicating a lack of training or experience and each recommended activity to meet that need. A blank copy of this report can be found in Section 4 of this Workbook.

Section 4. CS Training Interview Materials

Interview Summary Report

The following pages present a blank Interview Summary Report form, to be used in documenting the review and analysis of an individual's experience and competencies in key CS activities and duties. It is advised that both parties (Contracting Officer/Supervisor and CS designee) become familiar with this form prior to the interview.

CS INTERVIEW SUMMARY REPORT

INSTRUCTIONS: Use this form to interview each CS when developing training priorities and preparing Individual Development Plans. After completing the form, give one copy to the CS and file the other copy in the Contracting Officer's Workbook.

This summary document contains two sections:

- (1) The Competency Development Inventory: The Competency Development Inventory will contain those competencies to be developed, the training priority allocated for each competency, and the developmental activities specified (with dates of expected completion). The Contracting Officer will record completion of necessary developmental activities.*
- (2) The Training Blueprint Inventory: The Training Blueprint Inventory will summarize those areas requiring training, the training priority allocated for each area, and the developmental activities specified (with dates of expected completion). As with the Competency Development Inventory, the Contracting Officer will record completion of necessary developmental activities.*

CS Name: _____
 Contracting Officer Name: _____
 Interview Date: _____

Competency Development Inventory

Competencies to be developed:	Training Priority Essential = A Needed = B Helpful = C	Development Activities (e.g., course titles, specific resource materials)	Projected Completion Dates	Completed? (Y/N)

Individual Development Plan (IDP) Form

The following pages present a blank Individual Development Plan (IDP) form, to be used in all discussions regarding training and development across the federal government. It is advised that both parties (CO/Supervisor and CS designee) become familiar with this form prior to the interview.

Individual Development Plan

CONTRACT PHASE	COMPETENCY	EDUCATION	TRAINING Level I/Level II	OJT	EXPERIENCE	DATE COMPLETED
Acquisition Planning	0 Contracting Orientation					
	Determination of Need					
	1 Forecasting Requirements					
	2 Acquisition Planning					
	3 Purchase Requests					
	4 Funding					
	5 Market Research					
	Analysis of Requirements					
	6 Requirements Documents					
	7 Use of Government Property & Supply Sources					
	8 Services					
	Extent of Competition					
	9 Sources					
	10 Competition Requirements					
	11 Set-Asides					
	12 8(a) Procurements					
	Source Selection Planning					
	13 Lease Vs. Purchase					
	14 Price Related Factors					
	15 Non-Price Factors					
	16 Method of Procurement					
Solicitation Terms & Conditions						
17 Contract Types – Pricing Arrangements						
18 Recurring Requirements						
19 Unpriced Contracts						
20 Contract Financing						
21 Need for Bonds						

Individual Development Plan

CONTRACT PHASE	COMPETENCY	EDUCATION	TRAINING Level I/Level II	OJT	EXPERIENCE	DATE COMPLETED
	22 Method of Payment					
	23 Procurement Planning					
Contract Formation	Solicitation of Offers					
	24 Publicizing Proposed Procurements					
	25 Conduct Oral Solicitations					
	26 Solicitation Preparation					
	27 Preaward Inquiries					
	28 Prebid/Prequote/Preproposal Conferences					
	29 Amending/Canceling Solicitations					
	Bid Evaluation					
	30 Processing Bids					
	31 Bid Acceptance Periods					
	32 Late Offers					
	33 Price Analysis –Sealed Bidding					
	34 Responsiveness					
	Proposal Evaluation					
	35 Processing Proposals					
	36 Applying Non-Price Factors					
	37 Prices Analysis - Negotiations					
	38 Pricing Information from Offerors					
	39 Audits					
	40 Cost Analysis					
41 Evaluating Other Offered						

Individual Development Plan

CONTRACT PHASE	COMPETENCY	EDUCATION	TRAINING Level I/Level II	OJT	EXPERIENCE	DATE COMPLETED
	Terms & Conditions					
	42 Award without Discussions					
	43 Communications/Factfinding					
	44 Extent of Discussions (Competitive Range)					
	45 Negotiation Strategy					
	46 Conducting Discussions/Negotiations					
	Contract Award					
	47 Debriefing					
	48 Responsibility					
	49 Subcontracting Requirements					
	50 Prepare Awards					
	51 Issue Awards & Notices					
	52 Mistakes In Offers					
Contract Administration	53 Protests					
	54 Contract Administration Planning					
	55 Post-Award Orientation					
	Initiation of Work & Modification					
	56 Consent to Subcontract					
	57 Subcontracting Requirements					
	58 Contract Modifications					
	59 Options					
	60 Task & Delivery Order Contracting					
	Quality Assurance					
	61 Monitoring, Inspection, and Acceptance					

Individual Development Plan

CONTRACT PHASE	COMPETENCY	EDUCATION	TRAINING Level I/Level II	OJT	EXPERIENCE	DATE COMPLETED
	62 Delays					
	63 Stop Work					
	64 Commercial /Simplified Acquisition Remedies					
	65 Noncommercial Remedies					
	66 Documenting Past Performance					
	Payment & Accounting					
	67 Invoices					
	68 Assignment of Claims					
	69 Administering Securities					
	70 Administering Financing Terms					
	71 Unallowable Costs					
	72 Payment of Indirect Costs					
	73 Limitation of Costs					
	74 Price and Fee Adjustments					
	75 Collecting Contractor Debts					
	76 Accounting & Estimating Systems					
	77 Cost Accounting Standards					
	78 Defective Pricing					
	Special Terms					
	79 Property Administration					
	80 Intellectual Property					
	81 Administering Socio-Economic & Other Misc. Terms					
	Contract Closeout or					

Individual Development Plan

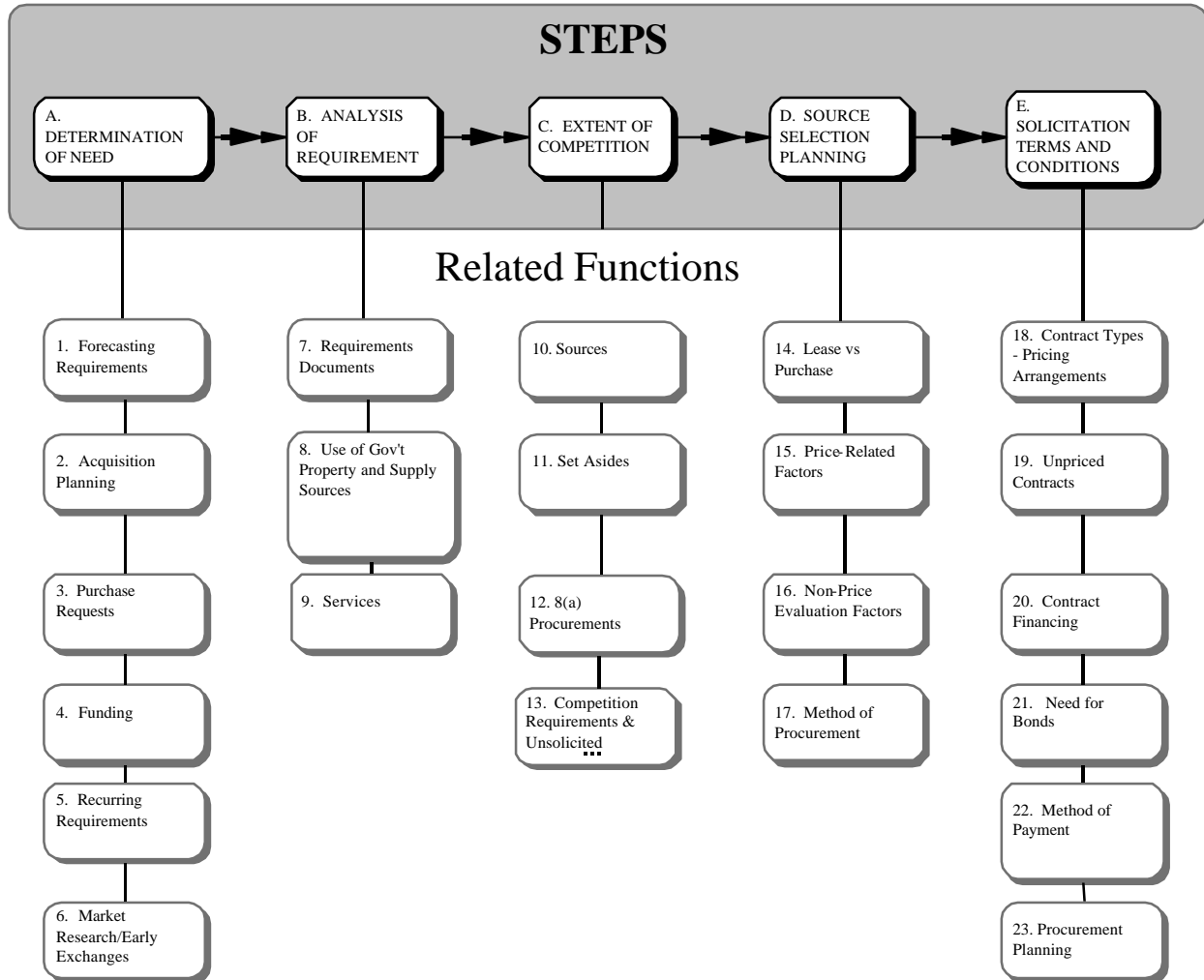
CONTRACT PHASE	COMPETENCY	EDUCATION	TRAINING Level I/Level II	OJT	EXPERIENCE	DATE COMPLETED
	Termination					
	82 Claims					
	83 Terminations					
	84 Closeout					
	85 Fraud & Exclusions					

Chart of the Procurement Process

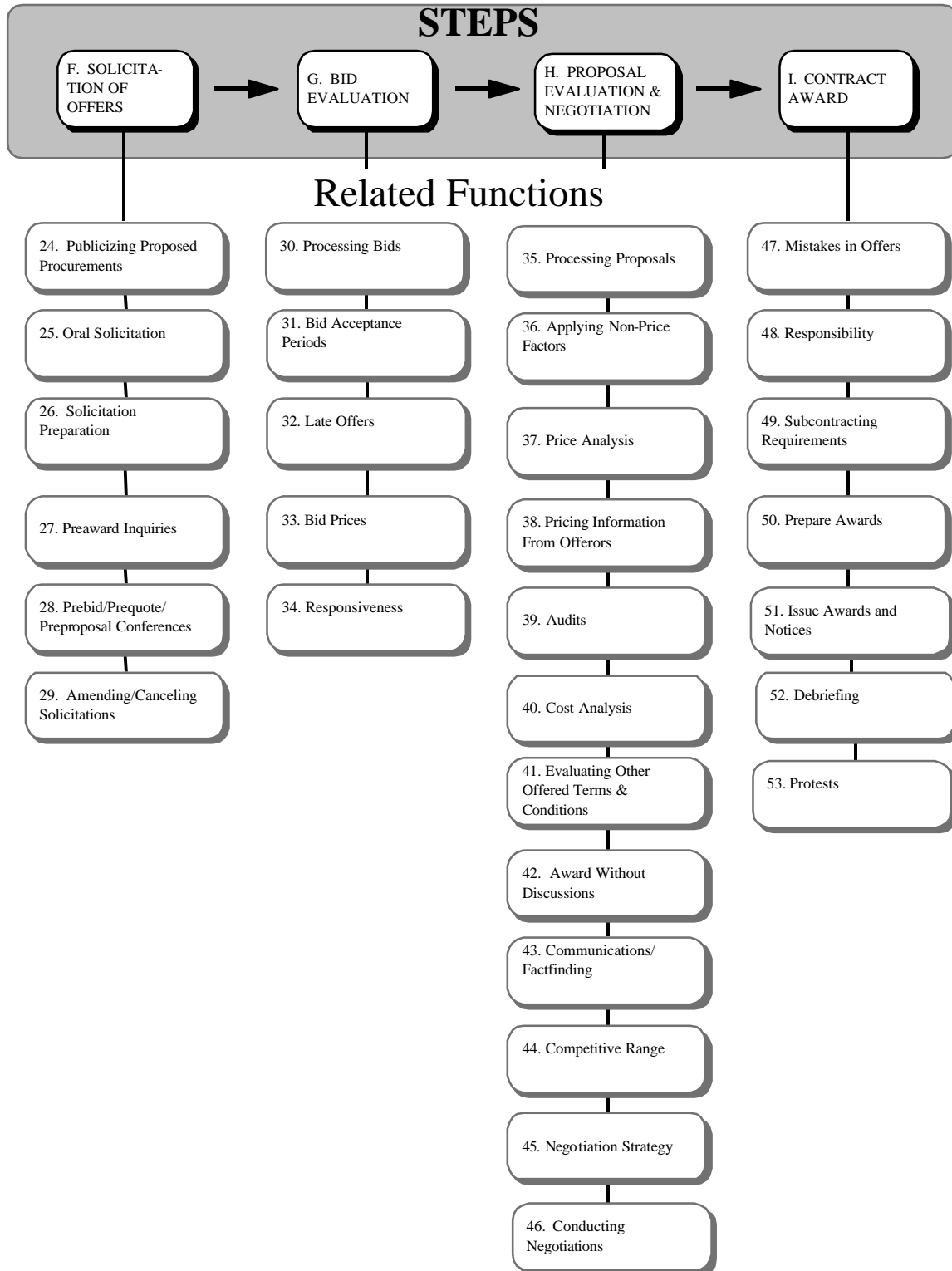
The following pages present a flowchart of the Federal Procurement Process—detailing the phases, functions, and steps of that process. This chart represents FAI's view on an ordering of duties and tasks for instructional purposes. The sequencing of functions or steps may vary from contract to contract. For example, some solicitations may be amended prior to the opening of proposals, as suggested by the flowchart, but others might not be amended until after the Government has begun to evaluate proposals. The units of instruction correspond to key CS actions for various numbered steps in the flowcharts.

However, please note that not every function or step applies to all CSs. Each agency will need to identify the degree of CS involvement based on their manpower, mission and policies.

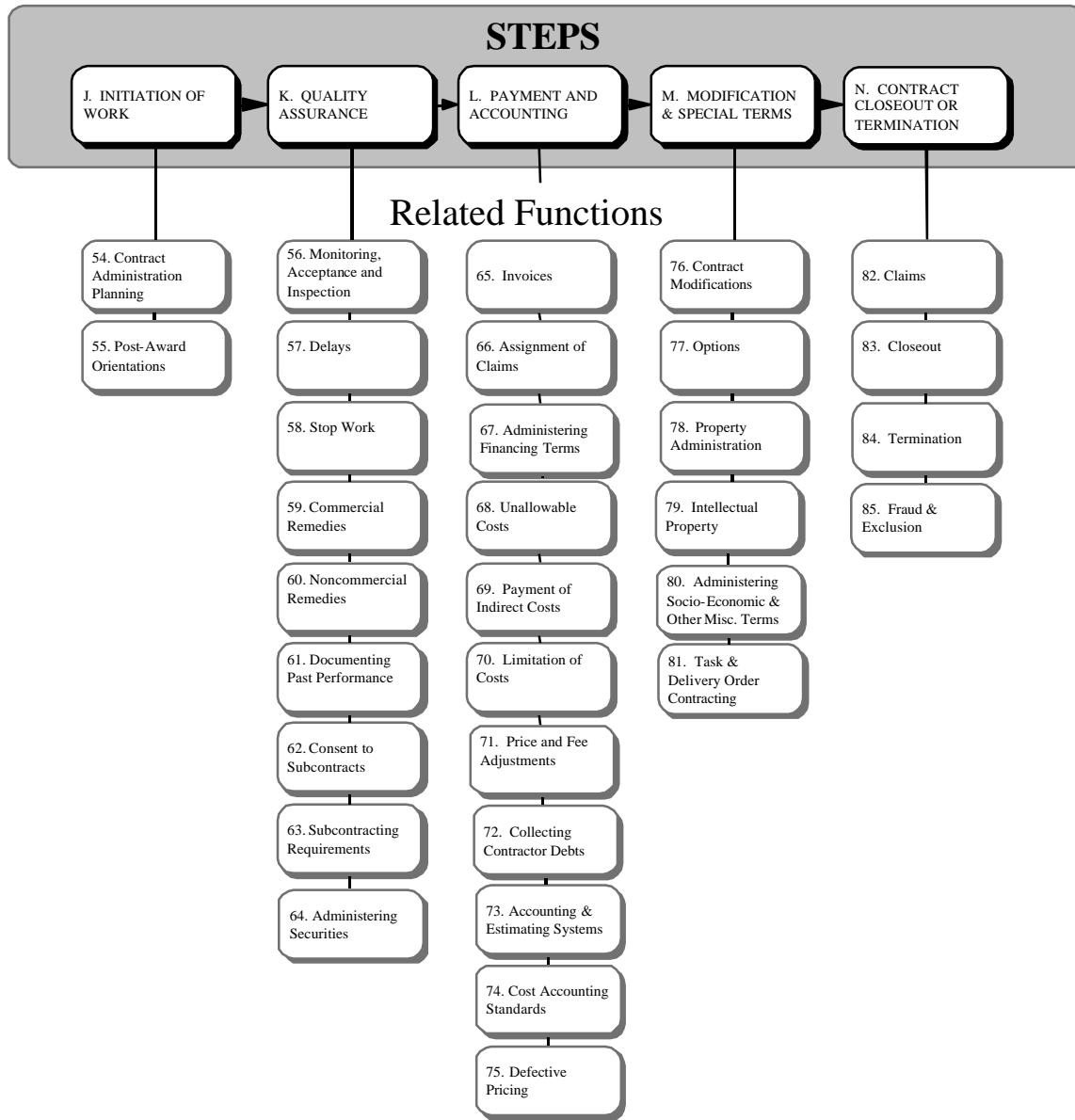
I. ACQUISITION PLANNING



II. CONTRACT FORMATION



III. CONTRACT ADMINISTRATION



CS Competencies

The following list contains those CS competencies as identified by FAI. These competencies comprise a foundation for effective performance of CS-related responsibilities. Full definitions for each of these competencies can be found in Appendix B.

Professional Business Competencies	Technical Competencies
Oral Communication	Strategic Planning
Decision-Making	Understanding the Marketplace
Interpersonal Skills	Understanding Sourcing (Commercial/Government Practices)
Problem Solving	Defining Government Requirements in Commercial and Non-Commercial Terms
Teamwork	Defining Business Relationships
Reasoning	Effective Communication
Customer Service	Detailed Evaluation Skills
Reading	Effective Negotiation Skills and Effective Analytical Skills
Attention to Detail	Effective Award Resolution
Contracting/Procurement	Effective Communication of Contract Requirements for Administration
Influencing/Negotiating	Effective Performance Management
Integrity/Honesty	Effective Financial Management
Planning and Evaluating	Make Decisions Related to Allowability of Contract Costs
Flexibility	Effective Resolution of Contract Termination and /or Closeout
Self-Management/Initiative	
Stress Tolerance	
Writing	
Creative Thinking	
Learning	
Self-Esteem	
Information Management	
Memory	
Arithmetic	
Math Reasoning	

Section 5. CS Training Documentation

COMPLETED Interview Summary Report(s)

Please store COMPLETED Interview Summary Reports for CSs behind this cover page. Make sure each report is accurately labeled with the CS's name, interview date(s) and agreed actions. When conducting periodic developmental discussions, both parties should "add on" to the same report.

COMPLETED Individual Development Plan (IDP) Forms

Both CSs and Contracting Officers can store copies of COMPLETED Individual Development Plans behind this cover page. Make sure each document is accurately labeled with the CS's name, plan date(s) and agreed actions. When conducting periodic developmental discussions, refer to this plan to help structure time and attention.

COMPLETED Training Certificates

Please store COMPLETED Training Certificates for the CSs behind this cover page. Make sure each certificate is accurately labeled with the CS's name, date and certified course content.

Section 6. Units of Instruction

Please refer to the supplemental documents for the 71 CS Units of Instruction.

Appendix A: Summary of Regulatory Updates Affecting CS-Related Content from September 2003 through July 2004

Summary of July 2004 Regulatory Updates

Regulatory Updates A thorough review of all CS-related content in this workbook was performed during July 2004 to ensure currency with appropriate federal regulations and guidelines. The following modifications were made in compliance with current regulations:

**Recommendations on Regulatory Updates Affecting CS Training Blueprints
from September 2003 to June 2004**

FAC 01-16^{3/4} October 1, 2003		
Applicable FAC Items	FAR References	CS Training Blueprint
<p>Item II Electronic Commerce in Federal Procurement</p>	<p>Part 4 Administrative Matters - Central Contractor Registration (eliminates FACNET requirement)</p> <p>Part 13 Simplified Acquisition Procedures</p> <p>Part 32 Contract Financing 52.232-33 Payment by Electronic Funds Transfer – CCR</p> <p>Part 52</p>	<p>Unit 3 Procurement Requests Unit 5 Identifying Possible Sources</p> <p>Unit 9 Method of Acquisition</p> <p>Unit 13 Contract Financing Unit 15 Method of Payment</p> <p>Unit 5 Identifying Possible Sources</p>
<p>Item IV Procurement for Defense Against or Recovery from Terrorism or Nuclear, Biological, Chemical or Radiological Attack and Temporary Emergency Procurement Authority</p>	<p>Parts 2, 10, 12, 13, 19 & 25</p>	<p>Unit 2 Market Research, Unit 4 Requirements Analysis, Unit 9 Method of Acquisition</p>
<p>Item V Notification of Overpayment, Contract Financing Payments</p>	<p>Part 32 Contract Financing</p>	<p>Unit 13 Contract Financing</p>

**Recommendations on Regulatory Updates Affecting CS Training Blueprints
from September 2003 to June 2004**

FAC 01-17^{3/4} October 20, 2003		
Applicable FAC Items	FAR References	CS Training Blueprint
Contract Bundling and Small Entity Compliance Guide	FAR Subparts 2.1, 7.1, 8.4, 10.0, 16.5, 19.2, & 42.15	Unit 5 Identifying Possible Sources Unit 7 Socioeconomic Requirements
FAC 01-18—December 11, 2003		
Applicable FAC Items	FAR References	CS Training Blueprint
Item III Federal Procurement Data System	FAR 4.6, 53.2 and 53.3	Unit 3 Procurement Requests
Item IV – Increased Federal Prison Industries, Inc., Waiver Threshold	FAR 8.606(e)	Unit 5 Identifying Possible Sources
Item V Department and Suspension-Order Placement and Option Exercise	FAR 9.4	Unit 5 Identifying Possible Sources Unit 54 Task and Delivery Order Contracting
FAC 01-19—January 7, 2004		
Applicable FAC Items	FAR References	CS Training Blueprint
Item I New Consolidated Form for Selection of Architect-Engineer Contractors	FAR Subparts 36.6 & 7, and 53.2	Unit 4 Requirements Analysis Unit 20 Solicitation Preparation
FAC 01-20—February 23, 2004		
Applicable FAC Items	FAR References	CS Training Blueprint
Special Emergency Procurement Authority	FAR subparts 2.1, 10.0, 12.1, 12.2, 13.2, 13.5, 15.4, 19.5, 19.8, 19.9, 19.13 and 25.11	Unit 9 Method of Acquisition

**Recommendations on Regulatory Updates Affecting CS Training Blueprints
from September 2003 to June 2004**

FAC 01-21—March 26, 2004		
Applicable FAC Items	FAR References	CS Training Blueprint
Purchases from Federal Prison Industries, Inc., Requirement for Market Research	FAR subparts 8.6, 8.7, 19.5, and 42.15	Unit 5 Identifying Possible Sources
FAC 01-22—April 5, 2004		
Applicable FAC Items	FAR References	CS Training Blueprint
Item I Government Property Disposal	FAR subparts 2.1, 8.1, 45.1, 45.5, 45.6, 49.1, 49.2, 49.3, 49.6, 52.2, and 53.3	Unit 70 Termination
Item II General Provisions of the Cost Principles,	FAR Subparts 2.1, 31.1, and 31.2	Unit 34 Cost Accounting Standards
Item IV Unsolicited Proposals	FAR 15.6	Unit 6 Limiting Competition
FAC 01-23—May 5, 2004		
Applicable FAC Items	FAR References	CS Training Blueprint
Item I Procurement Program for Service-Disabled Veteran-Owned Small Business Concerns	FAR subparts 2.1, 5.2, 6.1, 6.2, 6.3, 13.1, 14.5, 15.5, 19.1, 19.2, 19.3, 19.5, 19.8, 19.10, 19.11, 19.12, 33.1	Unit 1 Prepare a Requirements Package

**Recommendations on Regulatory Updates Affecting CS Training Blueprints
from September 2003 to June 2004**

FAC 01-24—June 18, 2004		
Applicable FAC Items	FAR References	CS Training Blueprint
Item I Incentives for Use of Performance-Based Contracting for Services (Interim)	FAR subparts 2.101, 4.601, 12.102, 37.601, 52.202-1	Unit 4 Requirements Analysis Unit 54 Task and Delivery Order Contracting
Item II Definitions Clause	FAR 2.101	Unit 20 Solicitation Preparation.
Item III Procurement Lists	FAR 8.002, 8.004, 8.703, 8.714, 52.208-9	Unit 5 Identifying Possible Sources
Item V Federal Supply Schedules Services and Blanket Purchase Agreements (BPAs)	FAR Subpart 8.4, Part 38, 52.213	Unit 5 Identifying Possible Sources Unit 11 Recurring Requirements Unit 54 Task and Delivery Order Contracting
Item VIII Application of Cost Principles and Procedures and Accounting for Unallowable Costs	FAR 31.204	Unit 18 Subcontracting Requirements

Appendix B: CS Competency Definitions

Definitions for the Professional Business and technical CS competencies are presented on the following pages.

CS PROFESSIONAL BUSINESS COMPETENCIES

Professional Business Competencies	
Oral Communication	Expresses information to individuals or groups effectively, taking into account the audience and nature of the information; makes clear and convincing presentations, listens to others; attends to nonverbal cues.
Decision-Making	Makes sound, well informed, and objective decisions; perceives the impact and implications of decisions; commits to action, even in uncertain situations, to accomplish organizational goals; causes change.
Interpersonal Skills	Shows understanding, courtesy, tact, empathy; develops and maintains relationships; deals with difficult people; relates well to people from varied backgrounds; is sensitive to individual differences.
Problem Solving	Identifies problems; determines accuracy and relevance of information; uses sound judgment to generate and evaluate alternatives, and make recommendations.
Teamwork	Encourages and facilitates cooperation, pride, trust; fosters commitment; works with others to achieve goals.
Reasoning	Identifies rules, principles, or relationships that explain facts, data or other information; analyzes information and makes correct inferences or accurate conclusions.
Customer Service	Works with customers to assess needs, provide assistance, resolve problems, satisfy expectations; knows products and services.
Reading	Understands and interprets written material including technical material, rules, regulations, instructions, reports; applies what is learned from written material.
Attention to Detail	Is thorough when performing work and conscientious about attending to detail.
Contracting/Procurement	Has knowledge of various types of contracts, techniques for contracting or procurement, and contract negotiation and administration.
Influencing/Negotiating	Persuades others to accept recommendations, cooperate, or change their behavior; work with others towards an agreement; negotiates to find mutually acceptable solutions.
Integrity/Honesty	Contributes to maintaining the integrity of the organization; displays high standards of ethical conduct and understands the impact of violating these standards on an organization, self, and others; is trustworthy.
Planning and Evaluating	Organizes work, sets priorities, determines resource requirements, determines goals and strategies; coordinates with other organizations, monitors progress; evaluates outcomes.
Flexibility	Is open to change and new information; adapt behavior or work methods in response to new information, changing conditions, or unexpected obstacle; effectively deal with ambiguity.
Self-Management/Initiative	Sets well-defined and realistic personal goals; displays a high level of initiative, effort, and commitment towards completing assignments in a timely manner; works with minimal supervision; is motivated to achieve; demonstrate responsible behavior.
Stress Tolerance	Deals calmly and effectively with high stress situations (for example, tight deadlines, hostile individuals, emergency situations, and dangerous situations).

Professional Business Competencies	
Writing	Recognizes or uses correct English grammar, punctuation, and spelling; communicates information in a succinct and organized manner, produces written information that is appropriate for the intended audience.
Creative Thinking	Uses imagination to develop new insights into situations and applies innovative solutions to problems; design new methods where established methods and procedures are not applicable or are unavailable.
Learning	Uses efficient learning techniques to acquire and apply new knowledge and skills, uses training, feedback, etc., for self-learning and development.
Self-Esteem	Believes in own self-worth; maintains a positive view of self and displays a professional image.
Information Management	Identifies a need for and knows where or how to gather information; organizes and maintains information or information management systems.
Memory	Recalls information that has been presented previously.
Arithmetic	Performs computations using whole numbers, fractions, decimals, and percentages.
Math Reasoning	Solves practical problems by choosing appropriately from a variety of mathematical and statistical techniques.

CS TECHNICAL COMPETENCIES

Technical Competencies	
Strategic Planning	Advise customers on their acquisition-related roles as well as the development and implementation of strategies needed to assure that supplies and services are available when needed to meet mission requirements.
Understanding the Marketplace	Collect and analyze relevant market information from Government and non-government source; analyze and provide business advice on the procurement request; review and provide business advice in the preparation of requirements documents and related elements of the procurement request.
Understanding Sourcing (Commercial/Government Practices)	Identify possible sources for the acquisition through effective market analysis and knowledge of suppliers. Limit competition when it is appropriate to the acquisition situation based on business strategies and market environments. Determine whether to limit competition to small business concerns, eligible 8(a) concerns, or a single 8(a) concern.
Defining Government Requirements in Commercial and Non-Commercial Terms	Select appropriate offer evaluation factors for incorporation into the solicitation that tie back to clear and unambiguous technical requirements included in the RFP; determine the method of acquisition.
Defining Business Relationships	Select the most appropriate pricing arrangement(s) to solicit. Determine whether and how to provide for recurring requirements. Prepare unpriced orders and contracts. Determine whether to provide for Government financing and where necessary the method of financing. Determine bonding requirements for the solicitation and contract. Determine the method of payment. Determine whether a written source selection plan is necessary or desirable.
Effective Communication	Select and implement a method or methods of publicizing the proposed procurements. Establish appropriate subcontracting and make-or buy requirements. Conduct oral solicitations. Prepare a written solicitation that includes the appropriate provisions and clauses tailored to the requirement and assembled in a format appropriate to the acquisition method and market for the required supply or service. Respond to an inquiry about the solicitation received prior to contract award or a request for information under the Freedom of Information Act. Conduct a pre-quote, pre-bid, pre-proposal conference when appropriate. Amend or cancel a solicitation.
Detailed Evaluation Skills	Receive bids including the safeguarding, opening, reading, recording, and abstracting of each bid. Evaluate offered bid acceptance periods and take appropriate action. Determine whether a bid is late, and if late, whether it can be considered for contract award. Identify and resolve mistakes in bids. Calculate the evaluated price for each bid and determine whether the lowest price is reasonable. Determine responsiveness for the invitation for bids (IFB).

Technical Competencies	
Effective Negotiation Skills and Effective Analytical Skills	<p>Receive quotations/proposals including the safeguarding, opening, tracking, assessing compliance with minimum solicitation requirements, and identifying of quotations/proposals that will not receive further consideration. Apply non-price factors in evaluating quotations, proposals, and past performance. Determine what pricing information (if any) to require from offerors. Consider the adequacy of a firm's accounting and estimating systems in making contracting decisions. Assure that a firm properly discloses its accounting practices when required by Government cost accounting standards (CAS) and that the disclosed practices comply with CAS requirements. Obtain any necessary audit support. Establish pre negotiation positions on price including: the need to cancel and re solicit for price related reasons; the need for communications; the need for cost information; and the need to negotiate. Establish pre negotiation positions related to cost reasonableness and cost realism by analyzing cost and technical data from the offeror and other sources. Develop pre negotiation positions on terms and conditions other than price. Determine whether to award without discussions. Conduct communications to enhance Government understanding of proposals; allow reasonable interpretation of a proposal; or facilitate the Government's evaluation process. Select offerors/quoters for discussions (i.e., establish the competitive range under FAR Part 15). Prepare negotiation strategy. Conduct a negotiation session and document in the contract file the principal elements of the negotiated agreement.</p>
Effective Award Resolution	<p>Determine and document the responsibility or non-responsibility of a prospective contractor. Prepare purchase orders/contract and document the award recommendation. Help in distributing the contract award and related notifications. Debrief offerors at their request. Act to resolve acquisition complaints and concerns.</p>
Effective Communication of Contract Requirements for Administration	<p>Plan for contract administration. Conduct a post-award orientation. Monitor contractor subcontract management in accordance with prime contract requirements. Modify or adjust a contract when needed. Determine whether or not to exercise an available option. Utilize task order contracts, delivery order contracts, and basic ordering agreements.</p>
Effective Performance Management	<p>Monitor contract performance and take any necessary action related to delays in contract performance or the need to stop work under the contract. Apply remedies to protect the rights of the Government under commercial item contracts and simplified acquisitions. Apply remedies to protect the rights of the Government under noncommercial item contracts. Document past performance information.</p>

Technical Competencies	
Effective Financial Management	Approve or disapprove the request for an assignment of claims. Require the contractor to provide a bond or other securities to apply toward completing the contract in case the contract is terminated for cause or default. Assure that the contractor receives the appropriate contract financing in accordance with contract financing requirements and relate contract performance. Make decisions related to allowability of contract costs. Adjust the price or fee. Determine if cost or pricing data were defective (i.e., not current, accurate, and complete) and appropriate remedies. Determine whether to authorize payment against an invoice in full, in part, or not at all. Refer indications of fraud or other civil or criminal offenses to responsible officials. Determine and recover debts from contractors. Enforce Government and contractor compliance with special contract terms and conditions.
Make Decisions Related to Allowability of Contract Costs	Adjust the price or fee. Determine if cost or pricing data were defective (i.e., not current, accurate, and complete) and appropriate remedies. Determine whether to authorize payment against an invoice in full, in part, or not at all. Refer indications of fraud or other civil or criminal offenses to responsible officials. Determine and recover debts from contractors. Enforce Government and contractor compliance with special contract terms and conditions.
Effective Resolution of Contract Termination and /or Closeout	Analyze and negotiate and prepare a Contracting Officer's decisions. Terminate contracts when it is in the best interest of the Government. Perform contract closeout.