



DEPARTMENT OF VETERANS AFFAIRS
Deputy Assistant Secretary for Acquisition and Logistics
Washington, DC 20420

IL 049-08-02
April 10, 2008

OFFICE OF ACQUISITION AND LOGISTICS INFORMATION LETTER

- TO:** Under Secretaries for Health, Benefits, and Memorial Affairs; Assistant Secretary for Management; Executive-In-Charge, Office of Construction & Facilities Management; Veterans Integrated Service Network Directors; Directors, VA Medical Center Activities, Domiciliary, Outpatient Clinics, Medical and Regional Office Centers, and Regional Offices; Directors, Denver Acquisition and Logistics Center, Austin Automation Center, Records Management Center, VBA Benefits Delivery Centers, and the VA Health Administration Center; and the Executive Director and Chief Operating Officer, VA National Acquisition Center
- ATTN:** Head of the Contracting Activity, Contract Specialists, Contracting Officers, and other VA Acquisition Workforce Members
- SUBJ:** Contracting Officer Technical Representatives (COTR) Training Policy

1. This Information Letter (IL) replaces IL 049-06-06, dated June 21, 2006, on Contracting Officer's Technical Representative (COTR) Training. The purpose of this IL is to establish interim policy guidance for the training of COTRs. Note that this guidance only applies to COTRs who have been delegated authority in writing by a contracting officer. These requirements do not apply to officials who perform non-complex tasks such as invoice management or tracking of deliverables.
2. The training requirements outlined herein and pursuant to the guidelines contained in Office of Management and Budget Memorandum, <http://www.fai.gov/pdfs/11-26-COTR-Memo.pdf> are mandatory for all COTRs within VA and the requirements must be satisfied by November 25, 2008. Failure to meet the training requirements will result in the rescission of the COTR delegation, which could negatively impact the performance of the program.
3. All new COTRs and those appointed after November 26, 2007 must meet the training requirements of this program no later than six months from their date of appointment and must maintain their skills currency through continuous learning.

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4. COTRs that hold delegation letters on active contracts awarded prior to November 26, 2007 must review their training history and certify that they have received COTR training no earlier than November 2004.

5. Any training required to maintain currency or to reach 40 hours must be taken no later than November 25, 2008.

6. The training requirement is broken into three distinct categories:

- a. 22 hours of core training;
- b. 18 hours of agency specific training; and
- c. 40 hours of continuous learning points (CLPs)

7. The Associate Deputy Assistant Secretary (ADAS) for Acquisition and Logistics Programs and Policy (049P) is responsible for COTR training/certification. The ADAS has directed the Chief, Office of Acquisition Training and Career Development (ATCD) (049P1B) with managing and administering Federal Acquisition Certification (FAC) for COTRs. The ATCD will issue a completion certificate to each COTR upon completion of training.

8. The following courses can be accessed by registering with the Federal Acquisition Institute (FAI) at www.fai.gov.

a. Core Training (22 hours)

CLC106 – COR with a Mission Focus (8 CLPs)

CLM024 – Contracting Overview (8 CLPs)

CLC004 – Market Research (3 CLPs)

CLC007 – Contract Source Selection (1 CLP)

CLM003 – Ethics Training for Acquisition Technology and Logistics (2CLPs)

Individuals who have completed FAIs 24-hour “COR Mentor” course have satisfied this requirement.

b. Agency-Specific Training (18 hours)

Agency-specific training may also be completed through FAI (www.fai.gov). The courses below may be taken in any order as long as the CLPs total 18.

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CLM 014 – IPT Management and Leadership (8 CLPs)
CLC 006 – Contract Terminations (2 CLPs)
CLC 007 – Contract Source Selection (1 CLP)
CLC 114 – Contingency Contracting Officer Refresher (2 CLPs)
CLC 011 – Contracting For the Rest of Us (2 CLPs)
CLC 012 – Contracting Officer’s Representative (COR) Overview (4 CLPs)
CLC 013 – Performance Based Services Acquisition (PBSA) (6 CLPs)
CLB 016 – Introduction to Earned Value Management (1 CLP)
CLM 024 – Contracting Overview (8 CLPs)
CLM 031 – Improved Statement of Work (4 CLPs)
CLC 018 -- Contractual Incentives (3 CLPs)

c. Alternative Training Courses (18 hours)

In addition to those courses cited above, additional methods of training will suffice for initial FAC-COTR certification and continuous learning points. Certificates issued by any of the following vendors indicating 40 hours of COTR instruction will be accepted.

Management Concepts Inc. <http://www.managementconcepts.com/default.asp>

Business Management Research Associates, Inc. - <http://www.bmra.com/>

Northwest Procurement Institute, Inc. - <http://www.npi-training.com>

ESI International – <http://www.esi-intl.com/register/course.asp?coursecode=GCP-BTF>

USDA Graduate School
http://grad.usda.gov/index.php?option=com_content&task=view&id=305

Houseman & Associates - <http://housemanandassociates.com>

Atlantic Management Center Inc. <http://www.amciweb.com>

All other certificates and courses from other institutions and resources must be submitted to ATCD for verification of core competencies and approval.

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d. Continuous Learning

Note that beyond the training specified in Paragraphs 8a and b, COTRs must earn an additional 40 continuous learning points (CLPs) every two years from the date of their initial certification. Additional guidance on the CLP process is included in Attachment 1 and learning is available on the FAI Web site.

9. The certification process is under development and will be updated in the near future. In the interim, individual COTRs are required to maintain a copy of all training certificates and letters of delegation of authority for future retrieval and forwarding to the responsible program office. Please direct any questions regarding FAC-COTR to the Chief, ATCD (049P1B); send email to: VACO049A5E@va.gov.

/s/Maurice C. Stewart
ADAS for Acquisition and Logistics Programs and Policy (049P)

Attachment 1

Distribution RPC 7029

Guidance on Meeting the Requirements for Continuous Learning Points (CLP)

These guidelines reflect best-in-practice recommendations for continuous learning. Agencies retain flexibility and supervisors remain responsible for working with COTRs to identify those activities and opportunities of greatest benefit to the professional development of an individual. The training, professional activities, education and experience that are used to meet the CLP requirements must be job related.

A. Training

- 1) Completing awareness training. Periodically, agencies conduct briefing sessions to acquaint the workforce with new or changed policy. Generally, no testing or assessment of knowledge gained is required.
- 2) Completing learning modules and training courses. These may be formal or informal offerings from a recognized training organization, including in-house training courses/sessions, which include some form of testing/assessment for knowledge gained.
- 3) Performing Self-Directed Study. An individual can keep current or enhance his or her capabilities through a self-directed study program agreed to by the supervisor.
- 4) Teaching. Employees are encouraged to share their knowledge and insights with others through teaching of courses or learning modules.
- 5) Mentoring. Helping others to learn and become more productive workers or managers benefits the agency and the individuals involved.

B. Professional Activities

- 1) Participating in Organization Management. Membership alone in a professional organization will not be considered as fulfilling continuous learning requirements, but participation in the organization leadership will. This includes holding elected/appointed positions, committee leadership roles, or running an activity for an organization that one is permitted to join under current ethics law and regulation. The employee and supervisor must first ensure that participating in the management of an organization is allowed by the agency.
- 2) Attending/Speaking/Presenting at Professional Seminars/Symposia/Conferences. Employees can receive points for attending professional seminars or conferences that are job related. However, the supervisor needs to determine that the individual learned something meaningful from the experience. Because significant effort is involved in preparing and delivering presentations, credit should be given for each hour invested in the preparation and presentation.

3) Publishing. Writing articles related to acquisition for publication generally meets the criteria for continuous learning. Points will be awarded only in the year published. Compliance with agency publication policy is required.

4) Participating in Workshops. Workshops with planned learning outcomes.

C. Education

1) Formal training. Supervisors should use Continuing Education Units (CEUs) as a guide for assigning points for formal training programs that award CEUs. The CEUs can be converted to points at 10 CLP points per CEU.

2) Formal academic programs. For formal academic programs offered by educational institutions, each semester hour is equal to one CEU. A three-hour credit course would be worth three CEUs and 30 CLP points, assuming that it is applicable to the acquisition function.

Note - All activities may earn points only in the year accomplished, awarded or published.

SAMPLE ACTIVITIES	RECOMMENDED NUMBER OF HOURS
Active Association Membership (in relevant subject area such as program/project management, acquisition management, or appropriate technical area)	5 hours for an active membership year OR 1 hour for each 60 minutes of activity attended during the year
Publication of related management or technical papers, etc.	20 hours for articles 25 for technical paper
Formal rotational assignments	40 hours per assignment
Conference presentations, training or seminar delivery	2 hours for 60 minutes of first-time presentation (1 for presentation, 1 for preparation, .5 credit for repeat delivery of same material)
Team leadership activities, participation on project teams for new products/activities	1 hour for every 60 minutes of participation
Formal education	1 hour for each hour of instruction up to 36 hours for a 3 credit course or American Council on Education (ACE) recommendation
1 Continuing Education Unit (CEU)	10 hours
1 Continuous Learning Point (CLP), Professional Development Unit (PDU), or Professional Development Hour (PDH)	1 hour
1 credit hour (college course or ACE recommendation)	12 hours
Conference attendance	1 hour for each 50 minute presentation attended