Federal Acquisition Institute

FEDERAL ACQUISITION INSTITUTE
CONTRACTING OFFICER TECHNICAL REPRESENTATIVE
COMPETENCY VALIDATION REPORT

<SEPTEMBER 2008>

Federal Acquisition Institute

I.   Introduction

The Office of Management and Budget, Office of Federal Procurement Policy (OFPP) issued the Federal Acquisition Certification for Contracting Officer Technical Representatives (COTRs) on November 26, 2007. The memorandum established a structured training program for COTRs and other individuals performing these functions, including Contracting Officer Representatives (CORs), which standardized competencies and training across civilian agencies and improved collective stewardship of taxpayer dollars.

During the comment period, agencies provided feedback indicating a competency validation effort was needed to ensure continued alignment of the Federal Acquisition Institute (FAI) 2003 Contracting Officer Technical Representatives (COTR) competencies in light of the more robust definition of the acquisition workforce prescribed by OFPP and any changes in responsibilities. Aligned with the Office of Personnel Management (OPM) best practices in competency management, in August 2008, FAI initiated a study to revalidate the COTR technical competency model developed in 2003. A streamlined approach facilitated revalidation of the competencies in a timeline allowing for inclusion of any changes in the 2008 Acquisition Workforce Competencies Survey.

A successful re-validation of the COTR competency model hinges on identifying competencies that are integral to a COTR's acquisition role and incorporating those competencies into training and career development processes. During 2002 and 2003, competencies were identified for the Contract Specialist (CS) job function (i.e., the 1102 series). Those competencies provided the foundation for the current effort to identify and incorporate competencies into the career management of COTRs. As such, there was a need to refine the COTR model so as to more accurately reflect the role and duties of a COTR.

Identification of technical competencies that underlie effective COTR performance and using those competencies to guide training and development efforts can produce numerous benefits, such as:

- Applying validated competency-based human resource initiatives to serve the acquisition community by capitalizing on a foundation that is universal across the federal spectrum.
- Concentrating on those technical competencies common to COTRs across the federal acquisition community will contribute to a holistic approach to managing both contract and COTR performance.
- Facilitating the transition to a business-oriented strategy directing federal procurement and acquisition into the future.

- Establishing consistent language that may be used in identifying, nominating, and selecting the most qualified COTR for a particular contract as well as developing individual development plans for that COTR.

II.   Methodology

FAI created the COTR Validation Methodology analogous to key elements of OPM's Human Capital Assessment and Accountability Framework (HCAAF)-Workforce Planning Methodology. This approach was condensed and streamlined in order to meet the 2008 Acquisition Workforce Competency Survey launch deadline of August 4th, 2008. FAI specifically focused on:

1. Analyzing the current strengths and weaknesses regarding the technical COTR competency model,
2. Re-validating the competency model in order to incorporate it into the 2008 Acquisition Workforce Competency Survey (AWCS) so gap analyses could be performed, and
3. Establishing the foundation for periodic workforce data analysis used to drive policy and human capital decisions.

a. Sampling

In order to develop the most representative definition of the COTR function, its competencies and aligned skills, FAI involved acquisition professionals from various federal agencies to provide insight into the variations of the COTR role in those agencies. A threshold was established in order to have a substantive re-validation and meet the deadline of the 2008 AWCS launch. Participants were required to have a deep understanding of the COTR role, as well as the differences between COTR and Contracting Officer (CO) responsibilities, in order to conduct a precise validation exercise.

To accomplish this, FAI contacted Acquisition Career Managers (ACMs), who offered a diverse array of acquisition backgrounds both from an agency and geographical perspective. FAI requested the ACMs to identify volunteers to participate in the exercise. These volunteers could be the ACMs themselves or an appropriate designee from their agency. Additionally, our communications detailed the purpose of the validation exercise, instructions for the COTR competency and align skills review, and the estimated time of completion.

b. Agency Representation

Nine agencies participated in the various validation activities, both with the competency and aligned skills review and the consensus building exercise, which yielded concrete inter-agency support for the development of an accurate and current model. The federal agencies that participated in the COTR validation exercise were Department of Agriculture, Department of State, Department of Housing and Urban Development, Department of Health and Human Services, the General Services Administration, Department of Labor, the U.S. Department of Transportation, the Environmental Protection Agency, and the Holocaust Memorial Museum. Competency related data was also collected from the Department of Defense to expand the applicability and scope of the COTR model.

c. Phased Approach

In order to determine the most rigorous model in the most efficient way possible, FAI established a multi phased validation process for gathering and analyzing data.

Figure 1: COTR Validation Approach
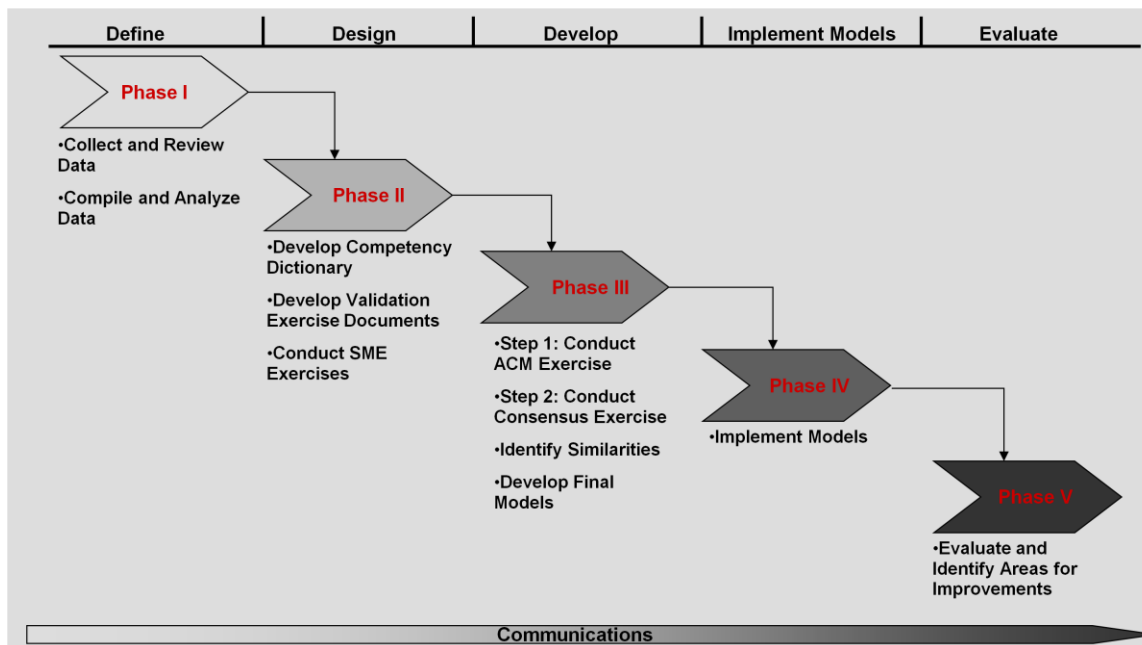
Phase I – Collect and Review Data

The first phase in the process was to gather all relevant data from internal and external sources. This included the existing COTR competency model and aligned skills, the COTR training blueprint, associated training courses posted on www.FAI.gov; external information received from the Department of Defense (DOD); and agency specific feedback. This information was then collected in a central repository and synthesized to reduce redundant inputs, and vetted against OFPP Policy Letter 05-01, FAC-COTR, and other resources to arrive at the most robust dictionary of COTR competencies. The output of the initial data gathering and analysis of all COTR related competency information was a consolidated competency dictionary with aligned skills.

Phase II – Develop Validation Exercise Documents and Tools

The competency dictionary was then expanded to include areas where feedback could be captured and target proficiency ratings noted. This revised tool, the expanded competency dictionary, was the linchpin to the successful completion of the second phase of the validation effort, subject matter expert (SME) review. During phase two of the validation effort, a group of COTR SMEs selected by FAI, based on their individual expertise in the COTR role, served as the first level reviewers of the COTR dictionary. The individuals represented disparate agencies, but were all members of the acquisition community and represented the Department of Housing and Urban Development (HUD), United States Department of Agriculture (USDA), and the United States Holocaust Museum Memorial (USHMM).

The SMEs were sent an electronic competency evaluation document in which they could record comments and suggestions regarding the inclusion or exclusion of competencies and aligned skills, as well as their definitions. These individuals were also responsible for developing a baseline target level proficiency for each competency and aligned skill that was determined to be in the scope of responsibility for a COTR. These proficiency ratings were based on a five-point scale:

Figure 2: Target Level Proficiency Rating Scale

0= None –No proficiency in the competency required.

1 = Basic – Individual should be capable of handling the simplest of assignments involving this competency, but need significant assistance beyond the easiest solutions.

2 = Foundational – Individual should be capable of handling some assignments involving this competency, but will need assistance beyond routine situations.

3 = Intermediate – Individual should be capable of handling many day-to-day assignments involving this competency, but may seek assistance in difficult or new situations.

4 = Advanced – Individual should be capable of handling most day-to-day assignments involving this competency, though may seek expert assistance with particularly difficult or unique situations.

5 = Expert – Individual should be capable of handling all assignments involving this competency and may serve as a role model and/or coach to others.

Following the collection of the SME evaluations, the COTR competency evaluation document was expanded to include SME comments and suggestions. Target proficiency ratings were set aside and combined with those gathered during subsequent phases (three and four) of the validation effort. The competency dictionary and evaluation document were again refined and used for phase three of the validation effort, which involved participation from ACMs, or their designees, from multiple agencies.

Phase III – Conduct ACM Exercises and Develop Model

Phase three of the COTR validation effort involved requesting voluntary participation from all ACMs by using the Inter Agency Acquisition Career Manager Committee (IACMC) contact list as a starting point. A total of nine individuals representing five agencies participated in this phase of the validation exercise expanding on the work generated up to this point. During phase three, ACMs were asked to comment on the output derived from the previous two phases, resulting in a purely voluntary effort. FAI reached across the acquisition community and requested participation in a two-step effort to mature the COTR competency model: 1) COTR competency validation and 2) consensus building exercise. Step one of phase three consisted of ACMs or their designees reviewing SME input, agreeing/disagreeing with SME input, providing comments, and rating target proficiencies for each competency and aligned skill using the same rating scale employed in the SME evaluations. A group of highly qualified participants were sought to validate the competencies, definitions, and aligned skills, as well as set target proficiency levels.

Following receipt of the ACM evaluations, the COTR competency evaluation process was closed and the dictionary was expanded to include the ACM comments and suggestions. Target proficiency ratings were aggregated to set the target, or desired, proficiency levels for all competencies and aligned skills. The competency dictionary was once again refined and used for phase three, step two of the validation effort which consisted of an interagency consensus building exercise to determine the final composition and content of the COTR technical competency model.

This final step in the validation process consisted of convening a group of participants, who were either ACMs or identified by ACMs as COTR SMEs, to vet the revalidated COTR model and determine its final composition. Six participants representing six agencies participated in the consensus building exercise. Using the most recent iteration of the COTR competency dictionary, the facilitator guided participants through each competency and aligned skill and the collective changes suggested for each.

Participants provided qualitative feedback concerning the suggested changes, and as a final verification were asked to complete a brief series of questions for each competency or aligned skill.

Figure 3: Consensus Exercise Validation Questions

>   1. Do you agree with the suggested changes to this competency or aligned skill?
>   a. Strongly agree
>   b. Agree
>   c. Neither agree or disagree
>   d. Disagree
>   e. Strongly disagree
>   f. No Answer
>   2. How confident are you in your agreement/disagreement?
>   a. Very confident
>   b. Confident
>   c. Neither confident or unconfident
>   d. Unconfident
>   e. Very unconfident
>   f. No Answer
>   3. Does this competency or aligned skill fall into the scope of responsibility for a COTR?
>   a. Yes
>   b. No
>   c. No Answer
>   4. If you chose "No" to question 3, why is this competency/aligned skill out of scope?
>   5. Please provide any additional comments you have associated with this competency or aligned skill.

All competencies and aligned skills contained in the competency dictionary were reviewed and votes captured. This twofold process of capturing verbal and numeric data was critical to the creation of the final validated COTR technical competency model. Changes were made if there was a minimum of 75% agreement amongst the participants. All attempts were made to reach 100% consensus without introducing facilitator bias that would influence the ratings. A before and after depiction of the COTR technical competency models follows in Figure 4:

Figure 4: COTR Competency Models Pre and Post Validation

Pre-validation COTR Competencies	Post-validation COTR Competencies
Strategic Planning: Ability to advise customers on their acquisition-related roles and in the development and implementation of strategies needed to assure that supplies and services are available when needed to meet mission requirements.	**Acquisition Planning:** Assist in the planning and implementation of strategies needed to assure that supplies and services are available when needed to meet mission requirements.
Market Research (Understanding the Marketplace): Ability to collect and analyze relevant market information and identify possible sources for the acquisition through effective market analysis and industry knowledge.	**Market Research (Understanding the Marketplace):** Conduct, collect and analyze relevant market information and identify possible sources for the acquisition through effective market analysis and industry knowledge.
Defining Government Requirements in Commercial/Non-Commercial Terms: Ability to determine or develop offer evaluation factors that will discriminate between offerors and that tie back to the technical requirements included in the solicitation. Ability to determine the most appropriate method of acquisition for each procurement request.	**Defining Government Requirements in Commercial/Non-Commercial Terms:** Define the necessary requirements to determine or develop offer evaluation factors that will discriminate between offerors, tie back to the technical requirements included in the solicitation, and assist the CO in determining the most appropriate method of acquisition for each procurement request.
Defining Contractual/Business Relationships: Ability to identify and select the most appropriate contractual terms and arrangements; for example, in pricing, financing, and payment methods.	Eliminated due to this being a primary responsibility of the CO.
Effective Communication/Solicitation of Offers: Ability to manage the solicitation process and adhere to procedures, including writing and publicizing the procurement, conducting discussions and conferences, and amending or canceling the solicitation when appropriate.	**Effective Pre-Award Communication:** Assist CO with technical issues related to industry questions concerning the procurement, conducting pre-proposal and pre-bid conferences, and protecting procurement sensitive information.
Detailed Bid Evaluation Skills: Ability to receive, handle, and evaluate bids adhering to proper procedures.	Eliminated due to this being a primary responsibility of the CO.
Proposal Analysis and Evaluation (Analytical Skills): Ability to receive, handle, and evaluate quotations/proposals adhering to proper procedures. Ability to obtain proper disclosure of accounting practices and to determine if the firm's accounting practices comply with Government cost accounting standards.	**Technical Analysis of Proposals:** Evaluate technical proposals against the evaluation criteria and participate in the evaluation of cost proposals; assist in best value trade-off analysis; evaluate past performance information and contact references if the CO delegates this responsibility; assist in the evaluation of return-on- investment (ROI).

As illustrated in the preceding table, the original COTR technical competency model included many areas that were not in the scope of COTR responsibility. Also illustrated in the preceding table, the re-validated COTR technical competency model was reduced and refined in order to more accurately depict the responsibilities of a COTR. Note that the pre-and-post validation snapshot for aligned skills can be found in the appendix.

Phase IV – Implement Model

As the clarification of definitions and aligned skills does not change the essential skills or competencies associated with the FAC-COTR, there is no impact for individuals already granted a FAC-COTR nor is there any impact on agency implementation of the FAC-COTR.

III.   Conclusion

The revised COTR competency model is a critical component of acquisition career management and provided essential content to the 2008 AWCS. The validated model will not only enable FAI and agencies to collect accurate acquisition workforce competency data, but also do so against the most accurate and reliable COTR model. This is imperative to agency talent management efforts (e.g. training, recruitment, succession planning, individual development). This revised and validated COTR model will be used to further refine the training associated with the COTR role.

Given that interagency feedback was a heavy influence on the decision to move forward with the validation effort, face validity of the new model has dramatically improved. One ACM simply commented, *"Thank you. Please tell FAI we really appreciate this."*

By conducting the re-validation, FAI is continuing effective competency management practices as well as responding to identified needs of the workforce. Through further analysis and continued examination FAI will ensure that the COTR model and other competency models for the acquisition workforce are accurate and aligned with all human capital and learning initiatives.

IV.   Appendix

a.   Sample exercises

Figure 6: SAMPLE SME Competency Pre-work Exercise

	Competency Title	Comment
1		
2	Strategic Planning	This is not the role of a COTR. It is the role of a CO to advise the program all the ...rid ways an acquisition can be done.
3		
4	Market Research (Understanding the Marketplace)	As a COTR they should be knowledgeable about their professional needs.
5	Defining Government Requirements in Commercial/Non-Commercial Terms	Again this is not the role of a COTR. It is the role of a CO once they are aware of the programs needs.
6		
7		
8		
9	Defining Contractual/Business Relationships	This is a shared role by the COTR and CO so knowing as much as they can will only assist them in the role as a COTR.
10		
11	Effective Communication/Solicitation of Offers	Change the wording from solicitation to post-award communication and it would be better.
12		
13	Detailed Bid Evaluation Skills	The COTR has part of the selection committee would need to be able to evaluate the technical aspects of the proposal.
14		
15	Proposal Analysis and Evaluation (Analytical Skills)	This is really the domain of the CO not the COTR
16	Negotiation Skills	Again this is really the domain of the CO not the COTR. Having knowledge of the items and products needed is helpful but knowing all the financial criteria is not necessary by the COTR.
17		
18		
19	Requirements Management (Effective Communication of Contract Requiren	This is the most important role of the COTR. This is the part of training that I show a great deal of emphasis on.

Figure 7: SAMPLE SME Aligned Skill Pre-work Exercise

	Competency Title	Aligned Skill Title	Comment
1			
2	Strategic Planning	Determining Method of Acquisition	These two go hand in hand however they are more related to the CO than COTR
3			
4	Market Research (Understanding the Market	Recurring Requirements	The COTR role is to know their department requierments and how best to get the items they need to carry out their mission.
5			
6			
7	Performance Management	Contract Administration Planning and Orienta	This is the main role of a COTR.
8			
9	COTR File Creation and Maintenance	Performance Management	All three of these go with the competency title as important roles for the COTR
10		Performance Metrics	
11		Contract Modification and Adjustment	
12			
13	Effective Communication/Solicitation of Offe	Solicitation Preparation	None of these are the duties of a COTR and we have just been wasting their time in trying to teach them these skill sets.
14	Effective Communication/Solicitation of Offe	Responding to Inquiries and FOIA Requests	
15	Effective Communication/Solicitation of Offe	Pre-Quote/Pre-Bid/Pre-Proposal Conferences	
16	Detailed Bid Evaluation Skills	Managing the Bidding Process	
17	Proposal Analysis and Evaluation (Analytical	Managing the Quotations and Proposal Process	
18			
19			
20			
21			
22			
23			
24			
25			
26			
27			

Figure 8: SAMPLE ACM COTR Validation Effort Instructions

Figure 9: SAMPLE ACM Competency Validation Exercise

Figure 10: SAMPLE ACM Aligned skill Validation Exercise

Figure 11: SAMPLE COTR Consolidated Competency Dictionary

Figure 12: SAMPLE COTR Consolidated Aligned Skill Dictionary

	A	B	C (Agree)	D (Disagree)	E (Proposed Changes to Definition)	F (Agree)	G (Disagree)	H (Comments)
		Proposed Changes to Title	Agree	Disagree	Proposed Changes to Definition	Agree	Disagree	Comments
	Strategic Planning		4	3	Who is customer in this context?	4	1	Revise the aligned skills to include: Business case analysis, Milestones, Gather historical data, Financial planning and management (e.g., assess return on investment, seek funding, perform analysis of alternatives, conduct cost benefit analysis, perform life cycle analysis, and total cost of ownership). Risk analysis, Strategic sourcing.
	Market Research	This skill covers how to conduct market research, i.e., understanding the market place, not knowing your requirement. Research may show a better way to meet the need. The COTR has a very important role to play in market research. They provide the first cut on not just the sources for the supply or service, but the terms and conditions under which those goods/services are sold to the general public (very important for FAR PArt 12.	5	3		5	0	The COTR role is to know their department requirements and how best to get the items they need to carry out their mission
	Determining Method of Acquisition	While the COTR does not determine the method of acquisition, they have very valuable input into the Contracting Officer's decision and so need to know about this as well.	6	2		4	0	Suggest removing "Determining Method of Acquisition" & "Selecting Offer Evaluation Factors"--> these are CO responsibilities Suggest Adding: Writing Statement of Work, Conducting Needs Analysis and Preparing Requirements Documents, Assisting in the Development of Acquisition Strategy, Determining Need for EVM
	Selecting Offer Evaluation Factors	While the COTR does not make the final determination of the evaluation factors, they do have very important input. They therefore need to know how to come up with good, appropriate evaluation factors.	4	2	Selecting Offer Evaluation Factors is a CO responsibility, but the COTR assists and proposes the technical factors	4	0	Suggest removing "Determining Method of Acquisition" & "Selecting Offer Evaluation Factors"--> these are CO responsibilities Suggest Adding: Writing Statement of Work, Conducting Needs Analysis and Preparing Requirements Documents, Assisting in the Development of Acquisition Strategy, Determining Need for EVM
	Documenting the Source				The COTR may provide input, but this is a CO responsibility.			Disagree with Aligned skill. This should be under acquisition planning as part of strategic planning, market search or defining the
	Methods of Payment				The COTR may provide input, but this is a CO responsibility.			Disagree with Aligned skill. This should be under acquisition planning as part of strategic

Sheet tabs: ORIGINAL COTR Competency / Comp Changes / Comp Proficiency / ORIGINAL COTR Skills / **Skill Changes** / Skill Proficien

b. Sample Consensus Results

Figure 13: Sample Consensus Presentation and Exercise
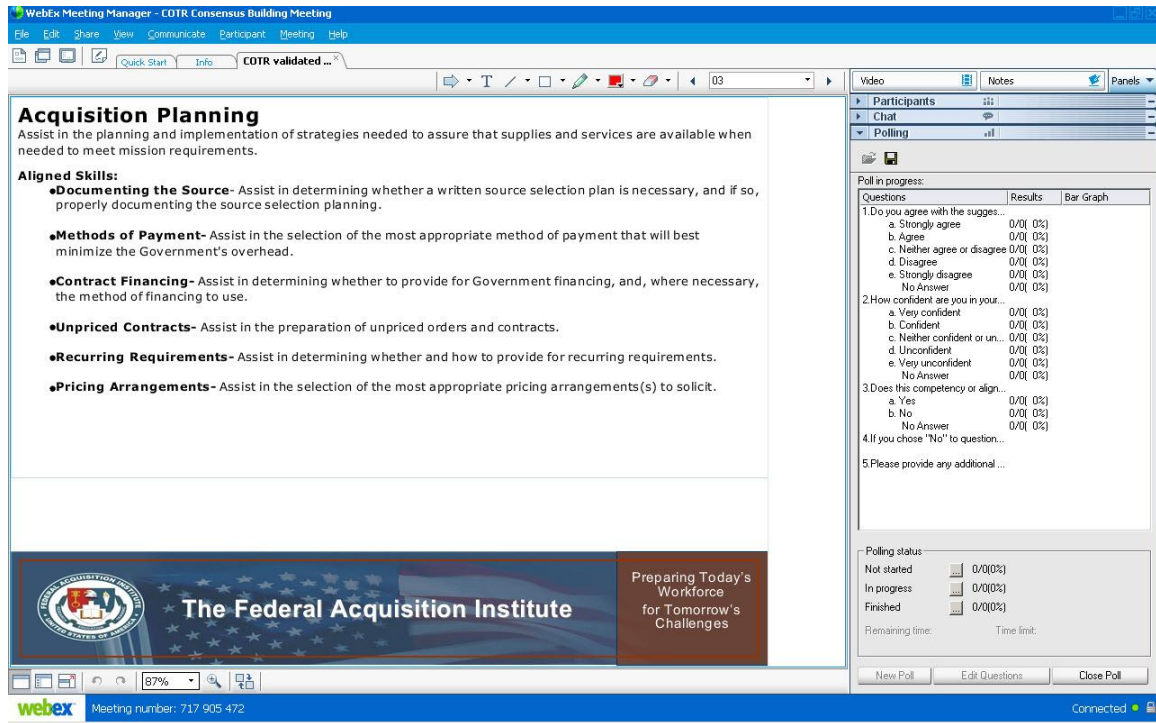
Figure 14: Sample Consensus Voting Exercise Group Results

<u>Competency</u>: Acquisition Planning

1. Do you agree with the suggested changes to this competency or aligned skill?
   a. Strongly agree   2/7 (29%)
   b. Agree   3/7 (43%)
   c. Neither agree or disagree   0/7 (0%)
   d. Disagree   0/7 (0%)
   e. Strongly disagree   0/7 (0%)
   f. No Answer   2/7 (29%)

2. How confident are you in your agreement/disagreement?
   a. Very confident   2/7 (29%)
   b. Confident   3/7 (43%)
   c. Neither confident or unconfident   0/7 (0%)
   d. Unconfident   0/7 (0%)
   e. Very unconfident   0/7 (0%)
   f. No Answer   2/7 (29%)

3. Does this competency or aligned skill fall into the scope of responsibility for a COTR?
   a. Yes   5/7 (71%)
   b. No   0/7 (0%)
   c. No Answer   2/7 (29%)

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4. If you chose "No" to question 3, why is this competency/aligned skill out of scope?
No Answer   7/7 (100%)

5. Please provide any additional comments you have associated with this competency or aligned skill.
None   1/7 (14%)
No Answer   6/7 (86%)

d. COTR Competencies and Aligned Skills Pre and Post Validation

Table 1: Changes Made to the COTR Competencies

Pre-validation COTR Competencies	Post-validation COTR Competencies
Strategic Planning: Ability to advise customers on their acquisition-related roles and in the development and implementation of strategies needed to assure that supplies and services are available when needed to meet mission requirements.	**Acquisition Planning:** Assist in the planning and implementation of strategies needed to assure that supplies and services are available when needed to meet mission requirements.
Market Research (Understanding the Marketplace): Ability to collect and analyze relevant market information and identify possible sources for the acquisition through effective market analysis and industry knowledge.	**Market Research (Understanding the Marketplace):** Conduct, collect and analyze relevant market information and identify possible sources for the acquisition through effective market analysis and industry knowledge.
Defining Government Requirements in Commercial/Non-Commercial Terms: Ability to determine or develop offer evaluation factors that will discriminate between offerors and that tie back to the technical requirements included in the solicitation. Ability to determine the most appropriate method of acquisition for each procurement request.	**Defining Government Requirements in Commercial/Non-Commercial Terms:** Define the necessary requirements to determine or develop offer evaluation factors that will discriminate between offerors, tie back to the technical requirements included in the solicitation, and assist the CO in determining the most appropriate method of acquisition for each procurement request.
Defining Contractual/Business Relationships: Ability to identify and select the most appropriate contractual terms and arrangements; for example, in pricing, financing, and payment methods.	Eliminated due to this being a primary responsibility of the CO.
Effective Communication/Solicitation of Offers: Ability to manage the solicitation process and adhere to procedures, including writing and publicizing the procurement, conducting discussions and conferences, and amending or canceling the solicitation when appropriate.	**Effective Pre-Award Communication:** Assist CO with technical issues related to industry questions concerning the procurement, conducting pre-proposal and pre-bid conferences, and protecting procurement sensitive information.
Detailed Bid Evaluation Skills: Ability to receive, handle, and evaluate bids adhering to proper procedures.	Eliminated due to this being a primary responsibility of the CO.
Proposal Analysis and Evaluation (Analytical Skills): Ability to receive, handle, and evaluate quotations/proposals adhering to proper procedures. Ability to obtain proper disclosure of accounting practices and to determine if the firm's accounting practices comply with Government cost accounting standards.	**Technical Analysis of Proposals:** Evaluate technical proposals against the evaluation criteria and participate in the evaluation of cost proposals; assist in best value trade-off analysis; evaluate past performance information and contact references if the CO delegates this responsibility; assist in the evaluation of return-on-investment (ROI).

Table 1: Changes Made to the COTR Competencies cont.

Requirements Management (Effective Communication of Contract Requirements): Ability to administer contract requirements and manage vendor relationships for effective delivery of goods and services.	**Effective Contract Management:** Communicate to the CO any recommended scope changes or other changes that may result in the modification to the contract, recognize the impact of changes on milestones, and identify and resolve technical problems and develop alternative solutions; participate in IBRs and analyze EVM data.
Performance Management: Ability to monitor contract performance and take any necessary action and apply remedies to protect the rights of the Government. Ability to use performance metrics to evaluate actual performance against goals.	**Performance Management:** Monitor contract performance and recommend necessary action to the CO, in order for the CO to protect the rights of the Government, and use performance metrics to evaluate actual performance against goals.

Table 2: Changes Made to the COTR Aligned Skills

Pre-validation COTR Aligned Skills	Post-validation COTR Aligned Skills
Strategic Planning: **Strategic Planning -** Advise customers on their acquisition-related roles and the development and implementation of strategies needed to assure that supplies and services are available when needed to meet mission requirements.	**Acquisition Planning:** **Documenting the Source-** Assist in determining whether a written source selection plan is necessary, and if so, properly documenting the source selection planning. **Methods of Payment-** Assist in the selection of the most appropriate method of payment that will best minimize the Government's overhead. **Contract Financing-** Assist in determining whether to provide for Government financing, and, where necessary, the method of financing to use. **Unpriced Contracts-** Assist in the preparation of unpriced orders and contracts. **Recurring Requirements-** Assist in determining whether and how to provide for recurring requirements. **Pricing Arrangements-** Assist in the selection of the most appropriate pricing arrangements(s) to solicit. **Compliance to FAR Guidelines-** Assist the CO with compliance of applicable FAR guidelines when acquiring products and services. **Determining Need for EVM-** Mitigate potential problems with cost, schedule, and technical risks. **Task and Delivery Order Contracting-** Suggest possible ordering vehicles to the CO in order to assist in determining the appropriate vehicles and submitting work package to request work under the contract. **Strategic Planning-** Advise customers on their acquisition-related roles and in the development and implementation of strategies needed to assure that supplies and services are available when needed to meet mission requirements.
Market Research (Understanding the Marketplace): **Market Research -** Collect and analyze relevant market information from Government and non-government sources as well as prospective offerors. Identify possible sources for the acquisition through effective market analysis and knowledge of suppliers.	**Market Research (Understanding the Marketplace):** **Market Research-** Conduct, collect, and apply market based research to understand the market place/requirement to provide the sources for a supply or service, the terms and conditions under which those goods/services are sold to the general public, and assist the CO on the best way to meet the need. **Collecting Source Information-** Gather all information related to the potential sources of an acquisition as well as, for commercial items, the terms and conditions under which the sources sell the goods and/or services involved.

Table 2: Changes Made to the COTR Aligned Skills cont.

Defining Government Requirements in Commercial/Non-Commercial Terms: **Selecting Offer Evaluation Factors -** Selecting appropriate offer evaluation factors for incorporation in the solicitation. **Determining Method of Acquisition -** Determine the most appropriate method of acquisition based on forecast requirements, acquisition plans, market research, the Procurement Request, and other related documents.	**Defining Government Requirements in Commercial/Non-Commercial Terms:** **Writing Statements of Work-** Create statements of work, SOOs and other related documents. **Conducting Needs Analysis and Preparing Requirements Documents-** Perform an analysis, based on standard methodology, to identify all requirements and obligations in order to assist in the development of requirements documents. **Assisting in the Development of Acquisition Strategy-** Assist the CO with the development of an appropriate acquisition strategy.
Defining Contractual/Business Relationships: **Environmental, Energy, and Water Efficiency -** Comply with applicable FAR requirements when acquiring energy, environmental, or water efficient products and services. **Pricing Arrangements -** Select the most appropriate pricing arrangements(s) to solicit. **Recurring Requirements -** Determine whether and how to provide for recurring requirements. **Unpriced Contracts -** Prepare unpriced orders and contracts using a simplified acquisition procedure. **Contract Financing -** Determine whether to provide for Government financing, and, where necessary, the method of financing to use. **Methods of Payment -** Select the most appropriate method of payment that will best minimize the Government's overhead. **Documenting the Source -** Selection Plan Determine whether a written source selection plan is necessary, and if so, properly documenting the source selection planning.	These Aligned Skills were subsumed under the Acquisition Planning competency.

Table 2: Changes Made to the COTR Aligned Skills cont.

Effective Communication/Solicitation of Offers: **Publicizing Proposed Acquisitions -** Selecting and implementing a method of publicizing the proposed procurement. **Subcontracting Requirements -** Establishing requirements and incorporating the appropriate subcontracting and make-or-buy clauses in the solicitation. **Conducting Oral Solicitations/Proposals -** Planning and conducting effective oral solicitations/proposals. **Solicitation Preparation -** Prepare a written solicitation that includes the appropriate provisions and clauses for the requirement, assembled in a format appropriate to the acquisition method and market. **Responding to Inquiries and FOIA Requests -** Respond appropriately to an inquiry about the solicitation received prior to contract award or a request for information under the Freedom of Information Act. **Pre-Quote/Pre-Bid/Pre-Proposal Conferences -** Conduct a pre-quote, pre-bid, or pre-proposal conference when appropriate and maintain an accurate record of the meeting. **Amending/Canceling Solicitations -** Amend or cancel a solicitation when it is in the best interest of the Government and conforms to laws and regulations.	**Effective Pre Award Communication:** **Publicizing Proposed Acquisitions-** Recommend to CO additional methods of publicizing the proposed procurement when appropriate. **Subcontracting Requirements-** Recommend appropriate requirements are put into solicitations for subcontracting or make-or-buy situations. **Solicitation Preparation-** Assist in the preparation of a written solicitation, providing guidance as needed in the selection of the appropriate provisions and clauses for the requirement. **Pre-Quote/Pre-Bid/Pre-Proposal Conferences-** Assist with the pre-quote, pre-bid, or pre-proposal conference when appropriate and maintain an accurate record of the meeting. **Amending/Canceling Solicitations-** Provide input into the amendment or cancelation of a solicitation when it is in the best interest of the Government and/or Agency.
Detailed Bid Evaluation Skills: **Managing the Bidding Process -** Effectively manage a sealed bidding process including receiving and recording bids, evaluating the received bids, calculating the evaluated price, and determining whether the low bid conforms to all requirements.	Aligned Skill was eliminated based on SME feedback.

Table 2: Changes Made to the COTR Aligned Skills cont.

Proposal Analysis and Evaluation (Analytical Skills): **Managing the Quotations and Proposal Process -** Receive quotations/proposals including the safeguarding, opening, tracking, assessing compliance with minimum solicitation requirements, and identifying the quotations/proposals that will not receive further consideration. **Evaluating Non-Price Factors -** Apply non-price factors in evaluating quotations, proposals, and past performance. **Pricing Information from Offerors -** Determine what pricing information to require from offerors. **Evaluating Accounting and Estimating Systems -** Determine 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. **Using Audit Information -** Using audit findings to support cost analysis, price analysis, or cost reasonableness analysis and to develop negotiation objectives.	**Technical Analysis of Proposals:** **Evaluating Non-Price Factors-** Apply non-price factors in evaluating quotations, proposals, and past performance. **Pricing Information from Offerors-** Assist in determining what pricing information to require from offerors when requested by CO. **Evaluation Documentation-** Ability to clearly document reasoning behind proposed evaluation.
Negotiation Skills: **Performing Price and Cost Analysis (Negotiated Acquisitions) -** Establish pre-negotiation positions on price and cost factors. **Performing Analysis for Negotiated Acquisitions -** Establish pre-negotiation positions on price and cost factors and on other terms and conditions. **Conducting Proposal Communications -** Conduct communications to enhance Government understanding of proposals and to facilitate the Government's evaluation process. **Establishing the Competitive Range -** Select the offerors/quoters to participate in discussions thereby establishing the competitive range under FAR Part 15. **Negotiation Strategy -** Prepare a negotiation strategy and plan that will permit negotiators to maximize the Government's ability to obtain best value. **Conducting Discussions/Negotiations -** Conduct a negotiation session and negotiate an agreement on cost/price, terms and conditions. **Determining Responsibility/Capability -** Determine and document the responsibility or capability of a firm to effectively perform the terms and conditions of the contract.	**Negotiation:** **Negotiation Strategy-** Assist CO in preparing a negotiation strategy that will permit negotiators to maximize the Government's ability to obtain best value. **Conducting Discussions/Negotiations-** Assist CO in conducting a negotiation session and negotiating an agreement on cost/price, terms and conditions. **Determining Capability-** Assist in determining and documenting the capability of a firm to effectively perform the terms and conditions of the contract.

Table 2: Changes Made to the COTR Aligned Skills cont.

Requirements Management (Effective Communication of Contract Requirements): **Contract Administration Planning and Orientations -** Plan for the review, evaluation, and judging of a contractor's performance; clearly define the COTR roles and responsibilities. Conduct post-award orientation meetings to review contract milestones and responsibilities. **Contract Modification and Adjustment -** Modify or adjust a contract when appropriate in an effective and equitable manner. **Task and Delivery Order Contracting -** Apply the policies and procedures for utilizing task and delivery order contracts and using basic ordering agreements.	**Effective Contract Management:** **Contract Administration Planning and Orientations-** Define the COTR roles and responsibilities by knowing the terms and conditions to which they are assigned; and participate in post-award orientation meetings to review contract milestones and responsibilities. **Contract Modification and Adjustment-** Request/recommend contract modifications or adjustments and provide appropriate documentation for the request to the CO. **Work Order Management-** Submit work package to request work under the contract.
Performance Management: **Performance Metrics -** Monitor performance by evaluating actual performance processes, workflow requirements, and outputs against pre-determined goals. **Performance Management -** Monitor contract performance and take any necessary action related to delays in contract performance or the need to stop work under the contract. Document past performance information completely and fairly, validly characterizing the contractor's actual performance.	**Performance Management:** **Performance Metrics-** Monitor performance by evaluating actual performance processes, workflow requirements, and outputs against pre-determined goals. **Performance Management-** Monitor contract performance and recommend to the CO any necessary action related to delays in contract performance or the need to stop work under the contract, and document past performance by accurately characterizing the contractor's actual performance. **Financial Management-** Monitor the contractor's financial progress and assist the CO with contract enforcement; technical cost, schedule and performance, for all contracts. Review and as authorized, approve contractor payment requests, review interim invoices (cost reimbursement, LH and T&M contracts) to make sure charges are commensurate with observed performance. Report any discrepancies in invoices to the CO and provide documentation to support the representation. **Contract Reporting-** Monitor and verify contract expenditures, anticipated funding issues or over runs, contract schedule compliance and anticipated schedule delays, contract technical performance and compliance with terms and conditions of the contract to the contracting officer in an efficient and timely manner. **Inspection and Acceptance-** Inspect and accept deliveries and services by inspecting deliverables and monitoring services for conformance with contract/order/agreement terms and conditions, and accept or reject them. Ensure compliance and completion by the Contractor of all required operations, including the preparation of the any

	forms (ex. Material Inspection and Receiving Reports) or equivalent which shall be authenticated and certified by the COTR that the services/supplies have been received and are acceptable. Process inspection report as supporting documentation for payment and maintain documentation of all inspections performed including disposition of the results. **Specialized Requirements-** Perform contract surveillance and ensure contractor compliance with environmental, health and safety issues for the special requirements inherent in a hazardous material, services contracts, and construction contracts.