



**Federal Acquisition Institute**

**FEDERAL ACQUISITION INSTITUTE  
CONTRACTING OFFICER TECHNICAL REPRESENTATIVE  
COMPETENCY VALIDATION REPORT  
EXECUTIVE SUMMARY**

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**Federal Acquisition Institute**

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### Executive summary

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.

FAI collaborated with eight agencies across the Federal spectrum in this revalidation effort and a list of participating agencies is contained in the detailed report entitled, COTR Revalidation Study and located at [www.fai.gov](http://www.fai.gov). The key issues emerging from the revalidation effort and the resolution of these issues are presented in Table 1.

Table 1: Key Issues and Resolutions

	Issue	Resolution
1.	Some skills in the model appear to be out of scope of responsibility for a COTR.	Gathered input from multiple COTR subject matter experts (SMEs) to refine the model to fit actual COTR roles and responsibilities.
2.	The original model contains skills for COTRs with definitions aligned to the contracting officer role vice the COTR role.	COTR SMEs identified the skills and competencies required to successfully perform role-based behaviors at the full performance level.
3.	COTR competencies, skills, and proficiency levels may vary depending on the assigned contract as well as the COTR’s agency.	COTR SMEs rated the proficiency required for competencies and skills based on their domain knowledge and organizational experience.
4.	More attention to the technical and operational aspects of the COTR role is needed.	COTR SMEs only revalidated the technical aspects of the role and expanded the competency definitions to fit COTR responsibilities.



FAI followed a five step process in revalidating the COTR competencies with each step inviting additional subject matter experts to comment and refine the work. This process resulted in a refined COTR competency model with no significant changes and continued alignment with the FAC-COTR. A summary of the changes made to the COTR competencies and aligned skills are depicted in Tables 2 and 3 as follows:

**Table 2: Changes Made to the COTR Competencies**

<b>Pre-validation COTR Competencies</b>	<b>Post-validation COTR Competencies</b>
<b>Strategic Planning:</b> 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.	<b>Acquisition Planning:</b> Assist in the planning and implementation of strategies needed to assure that supplies and services are available when needed to meet mission requirements.
<b>Market Research (Understanding the Marketplace):</b> Ability to collect and analyze relevant market information and identify possible sources for the acquisition through effective market analysis and industry knowledge.	<b>Market Research (Understanding the Marketplace):</b> Conduct, collect and analyze relevant market information and identify possible sources for the acquisition through effective market analysis and industry knowledge.
<b>Defining Government Requirements in Commercial/Non-Commercial Terms:</b> 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.	<b>Defining Government Requirements in Commercial/Non-Commercial Terms:</b> 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.
<b>Defining Contractual/Business Relationships:</b> 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.
<b>Effective Communication/Solicitation of Offers:</b> 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.	<b>Effective Pre-Award Communication:</b> Assist CO with technical issues related to industry questions concerning the procurement, conducting pre-proposal and pre-bid conferences, and protecting procurement sensitive information.
<b>Detailed Bid Evaluation Skills:</b> Ability to receive, handle, and evaluate bids adhering to proper procedures.	Eliminated due to this being a primary responsibility of the CO.
<b>Proposal Analysis and Evaluation (Analytical Skills):</b> 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.	<b>Technical Analysis of Proposals:</b> 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 3: Changes Made to the COTR Competencies cont.

<b>Negotiation Skills:</b> Ability to plan negotiation positions and prepare negotiation strategies. Ability to conduct a negotiation session and document the elements of the negotiated agreement.	<b>Negotiation:</b> Assist in the planning of negotiation positions and preparation of negotiation strategies, conducting a negotiation session, and documenting the elements of the negotiated agreement when requested by the CO.
<b>Requirements Management (Effective Communication of Contract Requirements):</b> Ability to administer contract requirements and manage vendor relationships for effective delivery of goods and services.	<b>Effective Contract Management:</b> 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 Internal Budget Reviews (IBR) and analyze Earned Value Management (EVM) data.
<b>Performance Management:</b> 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.	<b>Performance Management:</b> 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.

Additional detail regarding the before and after snapshots of the aligned skill level of detail is contained in the main report document. As the clarification of definitions 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.

The revalidated COTR competency model will better position agencies to develop, train, select, and assign the best COTR for an agency acquisition effort. The new COTR model will also increase the validity and reliability of data collected via the 2008 Acquisition Workforce Competency Survey (AWCS), thus increasing the ability of Agencies to report on mission and goal accomplishments for their respective acquisition workforce.