

**Some Ways to Get Your
40 Hours of
Acquisition Related Training
On-Line
to Maintain OSC Warrants
(Requirement is 40 hours every 2 years)**

NOTE: The following memo and related information is abstracted from the OAM - Purchase Card Training web site <http://intranet.epa.gov/oamintra/training/index.htm>

January 9, 2003

MEMORANDUM

SUBJECT: Continuing Education Training Requirements for Agency On-Scene Coordinators

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Numerous questions have been asked across the Agency regarding the continuing education requirements for warranted On-Scene Coordinators (OSCs). OSCs are required to obtain 40 hours of acquisition related training every two years in order to retain their contracting officer delegations of authority. Consequently, the Office of Acquisition Management (OAM) has developed the attached document to provide clarification on various aspects of the requirement.

The document is in the format of frequently asked questions. We request that you distribute the document to all removal managers and OSCs across the Agency and any others you believe would benefit from the information. We also will post this document on OAM's web-site at: <http://intranet.epa.gov/oamintra/training/index.htm>.

If you have any questions concerning these matters, please contact either Bruce Bakaysa on (202) 564-4373 or Tom Sullivan on (202) 564-4397.

Attachment

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Frequently Asked Questions

Continuing Education Requirement for On-Scene Coordinators

1. What is the time frame for the 40 hours of continuing education in acquisition that is required? Every two years? Starting from what point? Based on a calendar or fiscal year? Does the time frame matter based on when the OSC receives their warrant?

All contracting officers with delegated procurement authority above the \$2,500 micro-purchase threshold, in the federal government, are required to have at least 40 hours of acquisition related training every two years. The starting point for calculating the training is October 12, 1997, when the Office of Federal Procurement Policy (OFPP) Policy Letter No. 97-01 became effective. Paragraph 10 of Unit 15 of the EPA Acquisition Handbook states, “the continuing education requirement began in fiscal year 1998 and the training cycle renews every even (fiscal) year, i.e., 2000, 2002, etc.” The dates of each past and current two year cycle are indicated below:

<u>Begin</u>	<u>End</u>
10/12/97 (FY98)	9/30/99 (FY99)
10/1/99 (FY00)	9/30/01 (FY01)
10/1/01 (FY02)	9/30/03 (FY03)

The current cycle began on October 1, 2001 and will end on September 30, 2003. Therefore, all current OSCs, who possess a delegation of procurement authority (i.e., CO warrant), are required to complete their 40 hours of acquisition related training by September 30, 2003.

If an OSC warrant, for example, is issued in the third quarter of fiscal year 2003, then it is reasonable to conclude that there would not be sufficient time to fulfill the 40-hour training requirement within the given time frame. In that case, the two-year cycle for that employee would begin with the new period beginning October 1, 2003. Please note that it is the intent of this requirement that contracting officers obtain 40 hours of acquisition related training on a regular basis in order to remain as current as possible on changes and new developments within the acquisition field.

2. Tracking and documentation - clarification on records that are required, who should maintain them, level of detail.

It is the responsibility of the OSC to maintain records of their own training. This could also be fulfilled by the supervisor of the OSC if it is more convenient for the particular office involved. It may be more effective for the supervisor of several OSCs to retain copies of all their training records. Enough detail should be maintained to demonstrate that the training has been taken. This can simply be a list of the courses, dates, number of hours, source of the training, etc. It is the responsibility of the employee and supervisor to ensure that the required training is taken. Programs and individuals who have requested and received a CO warrant, have the added responsibility to ensure they maintain their warrant status by taking the 40 hours of acquisition related training every two years.

3. Types of training and activities that qualify, with examples geared to OSCs.

The 40 hours of acquisition related training can be obtained in numerous ways. The OSCs can take formal classroom training offered from any college or university or training institute (e.g., United States Department of Agriculture Graduate School, Management Concepts, Inc., EPA in-house training, etc.). Training can also be obtained through more informal ways, such as brown bag lunches offered by contracting officers, training conferences where contract topics are on the agenda, or computer-based on-line training. Even job details to positions that feature a significant amount of contracting work can be considered. It is the responsibility of the OSC's supervisor/organization to fund any training costs. OAM does not provide the 40 hours of training. However, if an OSC were to take, for example, the Contracting Officer Representative (COR) Training course, that is three days in length, this would certainly qualify toward the 40-hour requirement. This course is not a required course but one developed that is specific to EPA COR duties.

4. Is there a comprehensive list of courses that are available including on-line training?

Unfortunately, there is no comprehensive list anywhere that summarizes all of this information. The response to the next question provides various sources of information on acquisition training. There is some computer-based on-line training but not as much as one might think. There are plenty of traditional courses that cost money to attend, provided by both the government and commercial sources.

5. Can you identify any on-line sources where this training may be located?

The following sites can be accessed to find a few on-line training courses and where other acquisition training information can be found:

- a. <http://www.faionline.com>

Federal Acquisition Institute (FAI) On-Line University - if an OSC has never taken the FAI on-line COR Mentor Program, then this is an excellent way to obtain training on-line. Please note that this course can only be taken once. Several other on-line courses are available including training on market research and Javits-Wagner-O'Day (JWOD) requirements. You should also keep tuned into this site for any new developments.

b. <http://www.dau.mil/>

The Department of Defense (DOD) has a website for their Defense Acquisition University. This is totally dedicated to acquisition training and provides the most comprehensive acquisition training information available in the federal government. Information about any on-line training they have as well as all of their other course offerings can be found on this web-site. The following is a list of some of the computer-based on-line training available at this site:

ACQ 101	Fundamentals of Acquisition Management
CON 101	Basics of Contracting
CON 237	Simplified Acquisition Procedures
-	Javits-Wagner-O'Day (JWOD) Tutorial

c. <http://apps.fss.gsa.gov/umas/>

This General Services Administration (GSA) site provides numerous computer-based on-line courses related to the Federal Supply Schedule (FSS) including instruction on ordering services under the FSS, performance-based contracting, blanket purchase agreements, etc.

d. <http://www.arnet.gov/>

Another source for acquisition related training is the Acquisition Network web-site where various types of information is available including suggested sources.

e. <http://www.wifcon.com>

This site is called "Where in Federal Contracting" and is maintained by a commercial source. It may be helpful in providing information on various sources of training.

f. <http://www.ncmahq.org/>

The National Contracts Management Association (NCMA), which is a national association of contracting professionals, maintains a web-site that provides various training opportunities on-line and through seminars offered across the country.

g. <http://www.golearn.gov>

The federal government has established a site for e-learning. There may be a few courses there that could be somewhat acquisition related that may help. Although there are no directly related acquisition courses presently, these types of sites are frequently updated and should be kept in mind for the future.

h. There are also numerous commercial sources for training. You can contact the following vendor sites and any others that you may become aware of. This is by no means a comprehensive list or an endorsement of these particular firms, but they are on the list of vendors who have provided training recognized by DOD.

Business Management Research Associates, Inc.	http://www.bmra.com
Management Concepts, Inc.	http://www.managementconcepts.com
ESI International	http://www.esi-intl.com
Atlantic Management Center, Inc.	http://www.amci@amciweb.com
Northwest Procurement Institute, Inc.	http://npi-training.com

6. Would you comment on the appropriateness of the following list fulfilling the continuing education requirement for OSCs?

- A. FAI On-line COR Mentor**
- B. OAM's COR Recertification**
- C. Purchase Card Training - as refresher training**
- D. Annual Ethics Training**
- E. Technical Evaluation Panel (TEP) Orientation and Participation**
- F. Davis Bacon Act Training - provided by Department of Labor**
- G. Annual Fraud Awareness Training**
- H. Annual Conflict of Interest (COI)/Confidential Business Information (CBI) Training**
- I. Post Award Conferences**
- J. Project Management for Effective Field Operations (OSC Readiness Training)**
- K. OSC Tool Box Training (OSC Readiness Training)**
- L. Various topics at periodic OSC training sessions**

1) Item A, FAI On-line COR Mentor - generally, no. Taking the FAI On-line COR Mentor course fulfills a basic OAM requirement in order to be a COR. Those aspiring to be CORs are required to either take the FAI on-line course **or** the three-day COR Training course provided by OAM. If an OSC has taken OAM's three-day COR Training course and never taken the FAI on-line course, then the FAI on-line course could be taken and counted toward the continuing education requirement. However, if an OSC has already taken the FAI on-line course, it cannot be retaken and considered eligible to fulfill the continuing education requirement. It should be noted that the FAI on-line course can only be taken once.

2) Items B, C (as refresher training), D, F, G, & H are all acceptable.

3) Items E & I, TEP Orientation/Participation and Post Award Conferences -

are just part of an OSC's normal COR duties during the competitive phase of an acquisition. We do not see these as qualifying as separate training or new learning experiences/job assignments.

4) Item J, Project Management for Effective Field Operations - by the title, this seems to be much more technically oriented; however, if there is a predominance of acquisition topics addressed, then possibly it could be acceptable.

5) Item K, OSC Toolbox Training - No. This is required OSC training provided by OAM which qualifies an OSC to receive a contracting officer warrant and would not be considered acceptable for fulfilling the continuing education requirements. The 40-hour training requirement would not be effective until the warrant is obtained. However, periodic refresher or supplemental training meetings for OSCs where acquisition issues are discussed and are clearly part of the agenda would be considered acceptable. Please note that only the portion of the agenda directly related to acquisition issues would be considered as acceptable training and not the entire meeting.

6) Item L, Various topics at periodic OSC training sessions - as long as the topics are acquisition related, then these would be considered acceptable. Remember to document all details about the training in your records.

7. Can you provide any ideas on how this training can be accomplished on-site given limited resources?

Suggestions include utilizing local contracting staffs to develop and conduct workshops, brown-bag lunches, training sessions, etc. on specific acquisition topics. On-line sources should also be considered and explored continually since this form of training is growing rapidly.

Any questions regarding this document should be directed to Bruce Bakaysa (202) 564-4373 or Tom Sullivan (202) 564-4397.

Some additional details about the no cost Federal Acquisition Institute (FAI) on-line computerized acquisition related training which is available via Internet access anywhere and anytime for warranted OSCs to comply with their minimum 40 hours every two years requirement of continuing acquisition related education.

Detailed steps are to login to www.faionline.com

- ... Register as user;
- ... Go into "Learning Center"
- ... Select "Course Information & Enrollment"
- ... Do a keyword search typing in "Acquisition" and the results list . .

A quick check currently listed 12 acquisition related on-line courses that an OSC could take as follows:

1. CON 101 Enrollment Instructions
(OSCs not encouraged to take as to complex)160 hours
2. Contracting Orientation. 16 hours
3. COR Mentor Course - New Modules 8 hours
4. COR Mentor Program. . (at EPA can only be taken once for credit) 24 hours
5. COTR Module 1 - Orientation.. 24 hours
6. COTR Module 2 - Acquisition. 32 hours
7. CTO Mentor Course. . .(targeted to AID contracting procedures). 24 - 30 hours
8. Javits-Wagner-O'Day (JWOD) Training for Acquisition Professionals 1 hour
9. Market Research. 8 hours
10. Set-Asides for Small Business 1 hour
11. Understanding the 8(a) Business Development Program 1 hour
12. US Coast Guard Simplified Acquisition (SAP) Checklist 1 hour

Clicking on the INFO hot link will result in the following information to help you select a course:

NOTE: This first offering CON 101 is an entry level course targeted for acquisition professionals and is rated at 160 hours of training. It provides a challenging level of detailed knowledge regarding Federal Acquisition policy and procedures. Only the most inquisitive type of OSC should attempt it as no partial credit will be given if the entire course is not completed.

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CON101 Course Application Procedures

DAU has established a new application system for Defense Industry contractors and Non-Department of Defense Federal employees.

To submit an application you will need Version 4.0 or higher of either MS Internet Explorer or Netscape Navigator. Please follow the below steps to register for CON101:

- Go to www.dau.mil.
- Select the e-Learning link on the top of the screen, and select the 'Apply for ALL Courses Here' option, OR,
- On the left side of the screen, select the DAU Courses link and select the 'Apply for a Course' option.
- Scroll down to your applicable employment status.
- If you are not employed by one of the uniformed services, select either 'Employees working on DoD contracts' or 'Federal employees working for Non-DoD Federal Agencies'.
- Select 'Continue to Non-DoD'.
- First time students should select 'Prepare Application'. Returning students should select 'Update student record'.
- Select 'prepare application' on the bottom toolbar to complete the registration process.
- When application is complete, select 'Create/Update Student Record' link found at the top of the form.

The application will be transferred to the Army Training Requirements and Resources System (ATRRS) and will be processed. You will be notified of a course reservation, wait list status or disapproval via an email generated through the ATRRS.

Contracting Orientation

Type: Self-paced

Available: Now

Course Credits: 16

Cost: \$0.00

Provider: Federal Acquisition Institute

Description:

This course is an introduction to the Federal acquisition process and has 16 CLPs. It is designed for anyone with a role in the acquisition of supplies or services for the Federal Government who needs a general knowledge of the:

- Nature and fundamental concepts of contracting
- Goals of the Federal acquisition process and environmental constraints on goal accomplishment
- Role of the Congress, the President, and the Judiciary in acquiring supplies and services for the Government
- Basic statutes and regulations that govern the acquisition process
- Key players and participants in the acquisition process and their respective roles and responsibilities in acquiring supplies and services
- Steps in the acquisition process
- Standards of conduct and ethics that apply to participants in the acquisition process

COR Mentor Course - New Modules

Type: Self-paced

Available: Now

Course Credits: 8

Cost: \$0.00

Provider: FAI - Federal Acquisition Institute

Description:

The COR Mentor Course outlines the duties of the Contracting Officer's Representative (COR). This course teaches the tasks and duties of the COR. When fully developed, it will have 18 lessons. Currently it is comprised of 6 lessons. The current 6-lessons course has one post-test, for which the passing score is 80%. If you need to obtain your COR certification, you should take the COR Mentor Program course, also provided in the course listing.

After earning a completion certificate, students may continue to access the course as an online reference. If a student retakes the course the original completion date will not change.

COR Mentor Program

Type: Self-paced

Available: Now

Course Credits: 24

Cost: \$0.00

Provider: FAI - Federal Acquisition Institute

Description:

The COR Mentor Program is designed for the Contracting Officer's Representative. The course teaches the tasks and duties of the COR. It is comprised of 18 duties, each with its own test. The passing score for each duty is 90%. There is no comprehensive test; the course is completed upon passing the test for the last duty.

Students may continue to access the COR Mentor Program after earning a completion certificate. However, the completion dates will remain unchanged.

COTR Module 1 - Orientation

Type: Self-paced

Available: Now

Course Credits: 24

Cost: \$0.00

Provider: FAI - Federal Acquisition Institute

Description:

This self-paced module is comprised of 5 lessons introducing the development and management of acquisition contracts.

The average cumulative time for course completion is about 24 hours. The course may be taken over time, returning to your last accessed page when convenient. The course includes periodic review questions, interactive practical exercise, and a post-test. The post-test requires a minimum score of 100%. A certificate of completion is available at the conclusion of a successful post-test. Upon earning the certificate, it will be available anytime in your personal student transcript. Student transcripts are found in the Administration Building / Student Records / Student Transcripts. Select the course title hyperlink to obtain the certificate.

COTR Module 2 - Acquisition

Type: Self-paced

Available: Now

Course Credits: 32

Cost: \$0.00

Provider: FAI - Federal Acquisition Institute

Description:

This self-paced module is comprised of 9 lessons introducing the acquisition planning of acquisition contracts.

The average cumulative time for course completion is about 32 hours. The course may be taken over time, returning to your last accessed page when convenient. The course includes periodic review questions, interactive practical exercise, and a post-test. The post-test requires a minimum score of 100%. A certificate of completion is available at the conclusion of a successful post-test. Upon earning the certificate, it will be available anytime in your personal student transcript. Student transcripts are found in the Administration Building / Student Records / Student Transcripts. Select the course title hyperlink to obtain the certificate.

This course includes a post-test with a required score of 100% and a certificate of course completion will be granted when completing the course successfully.

NOTE: It is not recommended to complete the CTO MENTOR COURSE because as stated it designed for learning USAID contracting policy and procedures and some of the material may not be consistent with EPA acquisition policy and procedures. Accordingly only EPA personnel who have a solid knowledge of our Agency's policy and procedures and are able to discern the differing approaches between the two government agencies would benefit from reviewing how AID addresses their international mission through contracting.

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CTO Mentor Course

Description:

This self-paced course is designed for the United States Agency for International Development's (USAID) Cognizant Technical Officers (CTO). In many agencies, the term Contracting Officer's Representative (COR) is used to describe the technical/project officer who manages/administers the award on behalf of the Contracting Officer after the award has been made. Since the USAID awards Acquisition and Assistance Instruments therefore the term Cognizant Technical Officer (CTO) is most appropriate. It is recommended that students take the CTO Mentor Getting Started course before taking this course to get oriented with the learning environment and CTO Mentor course requirements. The first part of USAID's CTO Mentor course addresses the roles and duties of the CTO under Acquisition Awards; the second part addresses the roles and duties of the CTO under Assistance Awards. The average cumulative time for course completion is 24-30 hours. You may take this self-paced course over time, returning to your last accessed page when convenient. The course includes periodic review questions and unit pre and post-tests. The test for each unit requires a minimum score of 80%. If the student successfully passes the unit pre-test with a score of 80% or better, he/she will be allowed to proceed to the next unit without having to go through the associated course material for that unit. If a passing score is not achieved in the pre-test, the student will need to go through the course material and pass the post-test. After successfully passing all units' test with an 80% passing score, a certificate of completion is available at the conclusion of the course, Acquisition and Assistance. Upon earning the certificate, it will be available anytime in your student transcript. Student transcripts are found in the Administration Building/Student Records/Student Transcripts. Select the course title link to obtain the certificate.

Javits-Wagner-O'Day (JWOD) Training for Acquisition Professionals

Description:

This training program was developed to provide all Acquisition professionals with a better understanding of the Javits-Wagner-O'Day (JWOD) Program: basic program information, operations and processes, and best practices.

Market Research

Description:

The Market Research is designed to help contracting specialists perform market research when considering contract award.

Set Asides for Small Business

Description:

This seminar is intended to provide Contracting and Procurement Specialist with a better understanding of the Small Business Set Aside Program. The Small business Set Aside Program is designed to increase opportunities for small businesses in the federal acquisition process.

Understanding the 8(a) Business Development Program

Description:

This seminar provides an understanding of the 8(a) Small Business Development Program. Students will learn key concepts that relate to the Federal Acquisition Regulation 19.8.

NOTE: Although targeted toward U.S. Coast Guard Simplified Acquisitions this quick overview of their checklist method is helpful in understanding the Federal Simplified Acquisition (SAP) process and would be somewhat beneficial for OSCs.

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USCG Simplified Acquisition (SAP) Checklist

Description:

General on-line guidance for most USCG SAP actions.

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