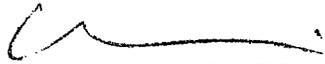




01 MAR 2008

MEMORANDUM FOR HEADS OF SERVICES AND STAFF OFFICES  
REGIONAL ADMINISTRATORS  
REGIONAL ACQUISITION EXECUTIVES

FROM: DAVID A. DRABKIN   
ACTING CHIEF ACQUISITION OFFICER (V)

SUBJECT: FEDERAL ACQUISITION CERTIFICATION FOR  
CONTRACTING OFFICER TECHNICAL  
REPRESENTATIVES (FAC-COTR)

1. Purpose: This Memorandum establishes the Federal Acquisition Certification - Contracting Officer Technical Representative (FAC-COTR) as a mandatory requirement for those serving as COTRs within the General Services Administration (GSA). This certification program will promote development of essential, standard acquisition competencies across GSA. COTRs seeking certification under this program will be required to demonstrate achievement of certain competencies. COTRs will also be required to maintain certification through continuous learning opportunities.

2. Background: The quality and effectiveness of the federal acquisition process depends on the development of a capable and competent workforce. The Services Acquisition Reform Act of 2003, P.L. 108-136, expanded the definition of acquisition to include functions performed by COTRs, such as managing and measuring contract performance and providing technical direction. COTRs and Contracting Officer Representatives (CORs) are terms given to individuals who are authorized in writing by the Contracting Officer (CO) to perform prescribed administrative and/or technical functions. For the purposes of this policy, the term "COTR" includes CORs and other individuals performing these functions.

Office of Federal Procurement Policy (OFPP) Policy Letter 05-01 established a requirement for federal acquisition certification programs. The FAC-COTR is issued pursuant to 41 U.S.C. 401, et seq and OFPP Policy Letter 05-01, paragraph 9. OFPP Policy Letter 05-01 built upon this broader definition of the acquisition workforce and required the Federal Acquisition Institute (FAI) to develop and the Chief Acquisition Officers Council (CAOC) to approve better standards for training and managing COTRs. An interagency working group chartered to develop the program and project management certification also recommended a separate certification for COTRs.

3. Applicability: The FAC-COTR program applies to all GSA employees who are or will be issued delegation letters designating them to perform the COTR functions.

All GSA COTRs appointed to a contract after the effective date of this policy must be certified no later than six months from their date of appointment and must maintain their skills currency through 40 hours of continuous learning every two years beginning the fiscal year following their certification date.

GSA COTRs who hold delegation letters on active contracts as of the effective date of this policy have generally taken agency-required training. To recognize this earlier training, current COTRs must review their training in accordance with agency policy, ensure that all essential competencies articulated in the Federal Acquisition Institute's FAC-COTR toolkit have been obtained, and be certified no later than 12 months from the effective date of this policy. Any additional training required to obtain needed competencies can count toward the continuous learning requirements for current COTRs.

4 FAC-COTR Training Requirements: Any member of GSA's acquisition workforce regardless of series may obtain FAC-COTR certification. Certification must be obtained before a delegation letter to administer a contract is issued.

FAC-COTR requirements may be completed in one of the following ways:

i. Completion of a minimum of 40 hours of Continuous Learning Points (CLP) in COTR training, of which a mandatory 22 hours must be completed from the following training courses or their designated equivalents:

CLC106 – COR with a Mission Focus (8 CLPs)

CLM 024 – Contracting Overview (8 CLPS)

CLC004 – Market Research (3 CLPs)

CLC007 – Contract Source Selection (1 CLP)

CLM003 – Ethics Training for Acquisition Technology & Logistics (2 CLPs) or equivalent course

Coursework modules for the mandatory 22 hours can be found and completed on FAI's online training center at [www.fai.gov](http://www.fai.gov) or at the Defense Acquisition University's (DAU) at [www.dau.mil](http://www.dau.mil). In addition, COTR/COR classroom training obtained from a DAU approved training vendor is an acceptable alternative to online training. The remaining 18 hours of training should include electives and other courses identified by the COTR's supervisor in consultation with the Contracting Officer, as necessary, for managing a particular contract. COTRs

must maintain their skills currency by earning 40 continuous learning points every two years.

Individuals who have completed the Defense Acquisition University's (DAU's) Contracting Officer Representative (COR) Mentor Program or its equivalent, no more than 3 years prior to 2007 are considered to have completed the mandatory 22 hours of required training. Such individuals however are required to complete an additional 18 hours of training in order to fulfill FAC-COTR requirements.

ii. Completion of the FAC-COTR Fulfillment Process. This process requires individuals seeking certification to demonstrate satisfactory proficiency in the required competencies. This process applies mainly to those individuals who previously served in a COTR role and completed COTR training before 2004.

iii. Completion of Federal Acquisition Certification in Contracting (FAC-C) Level I or Federal Certification for Program and Project Managers (FAC-P/PM) Mid-Level/Journeyman. Individuals certified under these two programs are considered to have met the FAC-COTR requirements. However, individuals certified under FAC-COTR have not necessarily met the requirements for FAC-C Level I or FAC-P/PM Mid-Level/Journeyman.

5. Maintaining FAC-COTR: To maintain FAC-COTR, all COTRS must maintain their skills currency through 40 hours of continuous learning every two years beginning on the fiscal year following their certification date. See FAI's FAC – COTR Toolkit for additional guidance on obtaining CLP.

Continuous learning activities related to FAC-COTR include, but are not limited to, the following:

- training activities, such as teaching, self-directed study, mentoring
- courses completed to achieve certification at the next higher level
- professional activities, such as attending/speaking/presenting at professional seminars/symposia/conferences, publishing and attending workshops
- educational activities, such as formal training, and formal academic programs
- experience such as developmental or rotation assignments

Failure to complete the 40 CLPs may result in the lapse of the FAC-COTR certification and suspension or revocation of delegation authority. Lapsed certifications may be reinstated when evidence of accumulation of sufficient CLP to total 40 CLP is demonstrated.

6. Certifications from other Agencies: GSA will not automatically recognize FAC-COTR certification issued by another agency. COTR appointments may be based on current certification from another civilian agency if the training completed meets the competencies outlined by FAI and if the 40 hour CLP requirement was completed and maintained. In addition, the COTR's supervisor in consultation with the Contracting Officer may require additional training relevant to the type of contract to be managed.

7. FAC-COTR Application Process: The GSA FAC-COTR application process is as follows:

Applicants are responsible for preparing an application package for submission to his or her supervisor. The application package must include the application form (See FAI Toolkit), copies of relevant training certificates and ACMIS record.

The supervisor in conjunction with the contracting officer is responsible for verifying the accuracy and completeness of application packages, issuing the letter of delegation, and submitting packages through customary correspondence channels to the Service/Regional Acquisition Executives who are responsible for:

- (i) Providing guidance on the preparation of applications
- (ii) Acting as liaison to the Acquisition Career Manager (ACM)
- (iii) Maintaining records relating to FAC-COTR Certification
- (iv) Signing and Issuing FAC-COTR Certificates

8. FAC-COTR Waivers: GSA's Chief Acquisition Officer may waive in writing, for a period not to exceed 12 months, all or part of the FAC-COTR requirements, on a case-by-case basis. Waivers will only be considered in compelling and well-documented circumstances if the waiver serves the best interests of the agency. This authority is not delegable. Waivers are not transferable to other agencies.

9. Acquisition Career Management Information System (ACMIS): For all civilian agencies, ACMIS will be the official system of records for the FAC-COTR program and will include waiver information, as necessary. Agencies and individuals are responsible for maintaining supporting certification documentation for quality assurance purposes. FAI is responsible for managing ACMIS and will issue guidance, as necessary, to support ACMIS implementation. Agencies are encouraged to begin entering or migrating data on designated program and project managers as soon as this guidance is implemented.

Attachments:

OMB November 26, 2007 Memorandum  
Federal Acquisition Institute, FAC-COTR Toolkit