

## TRAINING PLAN FOR CONTRACTING OFFICER'S REPRESENTATIVES (CORs) AND TASK MONITORS (TMs)

**I. OBJECTIVES:** Train DISA CORs/TMs in the skills needed for successful completion of contract administration. Identify competencies and provide a plan to develop and improve these skills.

**II. TARGET POPULATION:** Nominated and currently designated individuals who will perform collateral duties and responsibilities of a COR or TM.

**III. APPLICABILITY:** CORs/TMs, COR/TM supervisors, and contracting officers will ensure nominated and current CORs/TMs are in full compliance with the DISA Acquisition Regulation Supplement (DARS) (specifically, subpart 1.6).

Summary of Training (For specific details, see Section V.):

1. **Mandatory Courses**, which are both internal and external DISA-directed training courses. All CORs/TMs must obtain completion certificates and provide to the contracting officer before designation to assigned responsibilities. Complete courses at your own pace and within the guidelines identified in the DARS. See D1 Training web site at <https://datahouse.disa.mil/training.html> and D4 Homepage at <http://www.disa.mil/D4/>
2. **Optional Developmental Courses**, which CORs/TMs may need depending on prior experience and contract specifics. You must consult with your supervisor (and possibly the contracting officer) during your Individual Developmental Planning session so you both decide which of these you may need in order to perform your COR/TM duties. D151 schedules many of these classes.

***This Plan is for your use, keep it in your personal files. It is an important part of the record of your professional experience. You are responsible for initiating and completing the training, recording the date completed in your Plan, and forwarding the completion data to D151 for the Agency's training records.***

#### **IV. ADDITIONAL RESOURCES:**

- 1. DISA FAI "COR Mentor" Companion:** FAI's "COR Mentor" course is FAR based and requires DISA supplementation. The Companion complements FAI's "COR Mentor" web-based course by providing navigational information and supplementing course content with DISA specifics. Suggest you print a hard copy to use as a reference while taking the course.
- 2. DISA COR/TM Deskbook:** *Under development and projected availability is FY2000*, you'll be able to access the DISA deskbook via D4's homepage. The deskbook will be a living document and will contain procedures/guidance, samples, reference materials, dos and don'ts, checklists, etc. Intent is to provide a central reference guide complete with tools to enhance your day-to-day performance as a COR or TM.

**UPDATE YOUR TRAINING RECORD:** As soon as you have completed a course, forward your name, SSN, course title, number of training hours, and course duration (actual dates), via email, to your organizational training coordinator to send to the D151 training specialist. The updated HRD records now include the information

V. TRAINING -

A. MANDATORY COURSES

**CORE AREA:** Contract Administration

**TITLE:** *FAI's "COR Mentor"*

**DELIVERY METHOD/# OF HOURS**

Web-based/24 hours (varies with individual skill and experience levels)

**PROFICIENCY LEVEL:** Must score 90% on tests.

**FREQUENCY:** Initial requirement - Must complete all 18 duties for DARS compliance.

**DATE COMPLETED:** \_\_\_\_\_

**DATE CERTIFICATE SENT to CO:**

**COURSE DESCRIPTION:** Contains a total of 18 specific duties that may be assigned to a COR or TM. Each duty contains a summary, a procedural map delineating the steps involved in performing a duty, a multimedia tutorial, FAR references specific to each duty, an on-line helpdesk, and pre/post tests. You will learn: FAR policy and procedures and specific contracting administration skills that include: the development of milestones when related to workplans, participation skills in post-award orientations; monitoring contractor performance; administering property clauses, ability to identify termination situations and procedures; negotiation techniques, identification and documentation of performance problems; and determination of when work packages are sufficient to proceed with contract action.

**COMPETENCIES COVERED:**

- Oral and written communication
- Development of milestones
- Exercising Options
- Modifications
- Statements of Work
- Inspection & Acceptance
- Handling delays
- Stop work
- Remedies
- Market research
- Monitoring contractor's performance
- Contract inadequacies and discrepancies
- Management of monthly progress/status reports
- Documenting past performance
- Changes
- Prompt Payment Act
- GFP oversight
- Claims
- Post Award
- Property disposal and/or transfer
- Terminations
- Timely Government Response/Claims
- Contract closeout

**ELECTRONIC FEEDBACK:** *Upon completion of the FAI "COR Mentor" course, please take time to provide your comments and suggestions! It is DISA's goal to continuously enhance and improve the COR/TM training and we can ONLY do so with your assistance!!*

<p><b>CORE AREA:</b> Ethics</p> <p><b>TITLE:</b> <i>DISA's Annual Ethics Training</i></p>	<p><b>DELIVERY METHOD/# OF HOURS</b> Web-based/1 hour</p> <p><b>PROFICIENCY LEVEL:</b> Must score 100% on test and provide a completed financial disclosure statement to supervisor.</p> <p><b>FREQUENCY:</b> Annual requirement.</p> <p><b>DATE COMPLETED:</b> _____</p> <p><b>DATE CERTIFICATE SENT to CO:</b></p>
<p><b>COURSE DESCRIPTION:</b> Contains a summary of ethics and procurement integrity requirements as set forth in Part 1 of Executive Order 12674,5 C.F.R. Part 2635 and DoD 5500.7-R. Using recent regulations, the course describes ethics and procurement responsibilities of employees required to file a financial disclosure each year. This interactive computer based training, designed by the DISA Office of General Counsel staff, is composed of an introductory module and several subject-matter modules including gifts, procurement integrity, Hatch Act, and financial conflicts of interest. Mandatory training covers the introductory module and at least two subject-matter modules.</p>	
<p><b>COMPETENCIES COVERED:</b></p> <ul style="list-style-type: none"> <li>▪ Knowledge of basic ethics</li> <li>▪ Anti-Deficiency Act</li> <li>▪ Personal services and liability</li> <li>▪ Requirements of the Personal Disclosure Statements</li> <li>▪ Avoidance of Unauthorized Commitments/Ratification</li> <li>▪ Understanding Conflicts of Interest</li> <li>▪ Requirements of Gratuity/Favors</li> <li>▪ Security Requirements (classified documents disposal)</li> <li>▪ Inherently governmental functions</li> <li>▪ Non-disclosure/proprietary requirements</li> </ul>	

<p><b>CORE AREA:</b> Annual Refresher COR/TM Training</p> <p><b>TITLE:</b> <i>FAI's "COR Mentor"</i></p> <p><b>NOTE:</b> <b>I*If first time taking this course, you must take all 18 duties.</b></p>	<p><b>DELIVERY METHOD/# OF HOURS</b> Web-based/8 hours (varies with individual skill and experience levels)</p> <p><b>PROFICIENCY LEVEL:</b> CORs/TMs must complete 6 of the 18 duties to fulfill the Annual Refresher Training Requirements.</p> <p><b>FREQUENCY:</b> Annual requirement.</p> <p><b>DATE COMPLETED:</b> _____</p> <p><b>DATE CERTIFICATE SENT to CO:</b></p>
<p><b>COURSE DESCRIPTION:</b> Contains 18 specific duties that may be assigned to a COR or TM. Each duty contains a summary, a procedural map delineating the steps involved in performing a duty, multimedia tutorial, FAR references specific to each duty, an on-line helpdesk, and pre/post tests. You will learn: FAR policy and procedures and specific contracting administration skills that include: the development of milestones when related to workplans, participation skills in post-award orientations; monitoring contractor performance; administering property clauses, ability to identify termination situations and procedures; negotiation techniques, identification and documentation of performance problems; and determination of when work packages are sufficient to proceed with contract action.</p>	

**COMPETENCIES COVERED:**

- Oral and written communication
- Development of milestones
- Exercising Options
- Modifications
- Statements of Work
- Inspection & Acceptance
- Handling delays
- Stop work
- Remedies
- Market research
- Monitoring contractor's performance
- Contract inadequacies and discrepancies
- Management of monthly progress/status reports
- Documenting past performance
- Changes
- Prompt Payment Act
- GFP oversight
- Claims
- Post Award
- Property disposal and/or transfer
- Terminations
- Timely Government Response/Claims
- Contract closeout

**V. TRAINING (Continued...)**

**B. OPTIONAL DEVELOPMENTAL COURSE**

**CORE AREA:** Acquisition Process

**TITLE:** *FAI's Contracting Orientation*

**NOTE:** Highly recommended for the newly designated COR/TM and for individuals who do not have a contracting background and would like an overview.

**DELIVERY METHOD/# OF HOURS**

Web-based/16 hours (varies with individual skill and experience levels)

**PROFICIENCY LEVEL:** Must score 75% on post-tests.

**FREQUENCY:** NA.

**DATE COMPLETED:** \_\_\_\_\_

**DATE CERTIFICATE SENT to CO:**

**COURSE DESCRIPTION:** An introduction to the Federal acquisition process, you will obtain a general knowledge of the: fundamental concepts of contracting, goals of the federal acquisition process and environmental constraints on goal accomplishment; role of congress, the President, and the Judiciary in acquiring supplies and services; basic statutes and regulations; key players and participants and their respective roles and responsibilities in acquiring supplies and services; steps in the process; and standards of conduct and ethics.

**NOTE: This is just one example of an optional development course a COR/TM may need.**

**COMPETENCIES COVERED:**

- Basic statutes and regulations
- Identification of roles and responsibilities within the acquisition field
- Identification of process steps
- Knowledge of environmental issues and laws
- Overview contract requirements
- Standards of conduct and ethics that apply to participants in the acquisition process