

Spring 2018



COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Atlantic Management Center, Inc.

PREPARING TODAY'S WORKFORCE FOR TOMORROW'S OPPORTUNITIES

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

About This Catalog

This catalog is a collection of FAC-C and FAC-COR Certification and Elective courses selected to meet the learning needs of the acquisition workforce in accordance with OFPP's core requirements for education and training.

Atlantic Management Center, Inc. (AMCI) continuously updates the catalog with additional electives and specialized contracting courses to meet the emerging needs of the government-wide members of the acquisition community.

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Federal Acquisition Certification Courses and Electives

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Federal Acquisition Certification Courses and Electives

Part 1: FAC Core Certification

- [FCN 190 Federal Acquisition Regulation \(FAR\) Fundamentals](#)
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Federal Acquisition Certification Courses and Electives

FCN 190 Federal Acquisition Regulation (FAR) Fundamentals

Days: 10 CLPs: 80

Course Purpose:

FAR Fundamentals (FCN 190) is an optional contracting course for federal civilian agency GS-1102 contracting personnel. This course provides foundational knowledge of the Federal Acquisition Regulation (FAR) System. Specifically, the course will provide immersion training into the FAR. The course will focus on the application of the FAR to real world scenarios found in the contract planning, contract formation and contract administration phases.

Learning Objectives:

- 1 Using web-based resources, locate, cite, interpret and determine the applicability of policies and procedures in the FAR
- 2 Given access to online resources, explain the planning process as mandated by law and implemented by regulation.
- 3 Given access to online resources explain the policies and procedures for required and preferred sources of supplies and services.
- 4 Given access to online resources, identify the competition requirements for acquisitions.
- 5 Given access to online resources, identify a permissible method of contracting for a given acquisition.
- 6 Given access to online resources, identify a given pricing arrangement using the words and terms of FAR Part 16.
- 7 Given access to online resources, identify when the use of an option or an indefinite delivery contract is appropriate.
- 8 Given access to online resources, describe the policies and procedures for preparing specifications and statements of work.
- 9 Given access to online resources, describe the techniques for publicizing proposed contract actions.
- 10 Using Web-based resources, determine the applicability of socioeconomic programs to a given acquisition.
- 11 Identify the legal principles used by courts and boards of contract appeals to determine whether the Government has entered into a relationship involving one or more enforceable promises.
- 12 Given access to online resources, identify the policies and procedures for soliciting offers.
- 13 Given access to online resources, identify the policies and procedures for evaluating bids.
- 14 Given access to online resources, identify the policies and procedures for evaluating competitive proposals and having exchanges with offertory after receipt of proposals.

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Federal Acquisition Certification Courses and Electives

FCN 190 Federal Acquisition Regulation (FAR) Fundamentals, continued

- 15 Given access to online resources, identify the policies and procedures for making contract awards.
- 16 Given access to online resources, identify the policies and procedures for protests.
- 17 Given access to online resources identify the policies and procedures for the use of simplified acquisition procedures.
- 18 Given access to online resources, identify the policies and procedures for contract administration planning and post award orientation.
- 19 Given access to on-line resources, identify the policies and procedures for monitoring, evaluating and documenting contractor performance, and for handling performance delays.
- 20 Given access to on-line resources, identify the Government's rights when contractor performance does not comply with the contract specifications for a given contracting scenario.
- 21 Given access to on-line resources, identify the policies and procedures for payment.
- 22 Given access to on-line resources, identify the policies and procedure for preparing and processing contract modifications.
- 23 Given access to on-line resources, identify the policies and procedures for processing contract disputes and appeals.
- 24 Given access to on-line resources, identify the policies and procedures relating to the complete or partial termination of contracts for the convenience of the Government or for default.
- 25 Identify the policies and procedures for closeout of contract files.

Methodology:

Limited lecture/facilitated discussion; Research FAR and web sources; Reading assignments; Interactive activities; Case studies; Exercises; Homework** assignments

**The method of instruction used in FCN 190 is based on the Thayer method. The Thayer method is unique in that it requires students to teach themselves the material prior to class (as homework) and the instructor's role is to explain the material in class if there are any questions. Further, students are held accountable for their learning by being assessed on a daily basis.

Target Audience:

This course is designed for New hires to the Contracting Career Field (Civilian OCC Series 1102), active military personnel and those who seek certification in the contracting field. This course must be completed by employees in the Contracting Career Field (Civilian OCC Series 1102) within the first 24 months of employment. This does not extend or alter the requirement to meet certification requirements within 24 months of assignment to an acquisition position or change in position requirements.

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Federal Acquisition Regulation (FAR) Fundamentals (CON 090)

Days: 20 CLPs: 160

Course Purpose:

FAR Fundamentals is a four week, resident, foundational course for new hires that provides a total immersion into the Federal Acquisition Regulation (Parts 1-53) and the Defense Federal Acquisition Regulation Supplement (DFARS). The course will prepare the 21st century acquisition workforce to operate successfully in a web enabled environment. CON 090 is a limited lecture, research-intensive, exercised-based curriculum. Participants will analyze contracting business scenarios developed through research of the FAR and its supplements. The course is presented in four modules: Using the FAR and DFARS, Acquisition Planning, Contract Formation, and Contract Administration. Students are expected to become familiar with FAR parts 1-53. Students will be quizzed daily on FAR part knowledge, lecture/lesson content, and homework. Students should be prepared to dedicate 2-3 hours per evening for homework.

Learning Objectives:

- 1 Using Web-based resources, locate, cite, interpret, and determine the applicability of policies and procedures in the FAR, DFARS, DFARS PGI, and DoD class deviations.
- 2 Using Web-based resources, determine the requirements of the acquisition planning process as mandated by law and implemented by regulation.
- 3 Using Web-based resources, determine the policies and procedures for acquisitions from required and preferred sources of supplies and services
- 4 Using Web-based resources, determine the competition requirements for a given acquisition.
- 5 Using Web-based resources, determine a permissible method of contracting for a given acquisition.
- 6 Using Web-based resources, describe the types of contracts that may be used in acquisitions.
- 7 Using Web-based resources, determine the policies and procedures for describing agency needs
- 8 Using Web-based resources, determine the policies and procedures for publicizing contract opportunities.
- 9 Using Web-based resources, determine the applicability of socioeconomic programs to a given acquisition.

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Federal Acquisition Regulation (FAR) Fundamentals (CON 090) Course Objectives, continued

- 10 Identify the legal principles used by courts and boards of contract appeals to determine whether the Government has entered into a relationship involving one or more enforceable promises.
- 11 Using Web-based resources, determine the policies and procedures for soliciting offers.
- 12 Using Web-based resources, determine the policies and procedures for evaluating bids.
- 13 Using Web-based resources, determine the policies and procedures for evaluating competitive proposals and having exchanges with offerors after receipt of proposals.
- 14 Using Web-based resources, determine the policies and procedures for making contract awards.
- 15 Using Web-based resources, determine the policies and procedures for protests.
- 16 Using Web-based resources, determine the policies and procedures for the use of simplified acquisition procedures.
- 17 Using Web-based resources, determine the policies and procedures for the initiation of work.
- 18 Using Web-based resources, determine the policies and procedures for managing contractor performance.
- 19 Using Web-based resources, determine the policies and procedures for preparing and processing contract modifications.
- 20 Using Web-based resources, determine the policies and procedures for payment.
- 21 Using Web-based resources, determine the policies and procedures for processing contract disputes and appeals.
- 22 Using Web-based resources, determine the policies and procedures for terminating and closing out Government contracts.

Methodology: Limited lecture/facilitated discussion; Research FAR/DFARS/PGI and web sources (e.g. ACC, AKSS, GAO Reports, DPAP/SS policy directives); Reading assignments; Video presentations; Interactive activities; Case studies; Homework assignments

Target Audience: This course is designed for New hires to the Contracting Career Field (Civilian OCC Series 1102), active military personnel and those who seek certification in the contracting field. This course must be completed by employees in the Contracting Career Field (Civilian OCC Series 1102) within the first 24 months of employment. This does not extend or alter the requirement to meet certification requirements within 24 months of assignment to an acquisition position or change in position requirements.

Pre-requisites: None

Pre-course Assignments: Review FAR Parts & Subparts for FAR Challenge

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Federal Acquisition Certification Courses and Electives

Modules:

Module 1: Contracting Overview (FAR 1-4, 32-39, 41, 52, 53)

- Identify the basic principles of government contracting
 - Institutional Framework of government contracting
 - Federal Acquisition Regulation system
 - Source of statutory authority
 - Definitions
 - Ethics/Improper Business Practices
 - Administrative Matters
 - Special categories of contracting

Module 2: Contract Planning: (FAR 5-12, 16, 19, 22-26)

- Describe the policies and procedures associated with acquisition/contract planning
 - Market research, methods of procurement, contract types, and socio-economic requirements
 - Required sources of supply
 - Contractor responsibility
 - Small Business assistance
 - Pricing arrangements (as pertains to contract type)
 - Competition in Contracting Act (CICA)
 - Synopsis, pre-solicitation requirements

Module 3: Contract Formation: (FAR 13-15, 17, 18, 30-31)

- Describe the policies and procedures for soliciting offers and making awards
 - Simplified Acquisition Procedures
 - Sealed Bidding
 - Contracting by Negotiations
 - Source selection
 - Pricing
 - Multi-year/Options
 - Emergency acquisitions

Module 4: Contract Management: (FAR 27-29, 32, 33, 42-51)

- Describe the policies and procedures for post-award management of contractual actions
 - Contract administration
 - Contract modifications
 - Pricing of contract modifications
 - Protests, disputes and appeals
 - Contract financing and payment
 - Contractor performance/QA
 - Contract property management
 - Contract terminations/close-out

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Fundamentals of Cost & Price Analysis (CON 170)

Days: 10 CLPs: 80

Course Purpose:

Fundamentals of Cost and Price Analysis (CON 170) is a resident Defense Acquisition Workforce Improvement Act (DAWIA) Level I contracting course for newly hired GS-1102 contracting personnel. This course provides foundational knowledge of contract cost and price analysis. Specifically, the course provides training in applying quantitative tools to accomplish cost and price analysis in accordance with Federal Acquisition Regulations, Defense Federal Acquisition Regulation Supplement (DFARS), the DFARS Procedures, Guidance and Information (PGI), and the Contract Pricing Reference Guide (CPRG).

The course begins with an in-depth review of the Market Research process, and provides instruction to help students understand and analyze contractor pricing strategies. Students will learn to accomplish Cost-Volume-Profit analysis, calculate contribution margin estimates, and develop cost estimating relationships in order to accomplish an effective price analysis pursuant to FAR Subpart 15.4. The course provides an overview regarding the regulations and processes regarding the use of cost analysis, and for requiring certified cost and pricing data. Finally, after learning the basic elements of price and cost analysis, students will build and defend a pre-negotiation objective, including a minimum and maximum pricing objective with a Weighted Guidelines assessment. Students are also provided in-depth instruction on contract financing techniques, including the development and administration of progress payments based on cost and performance based payments. Students will become proficient with the use of the PBP Analysis Tool.

Learning Objectives:

- 1 Demonstrate ability to execute quantitative pricing skills.
- 2 Given an acquisition situation, successfully distinguish various seller pricing strategies.
- 3 Describe the Truthful Cost or Pricing Data statute, including its purpose in mitigating government cost risk.
- 4 Identify the policies and procedures for applying the Cost Accounting Standards Board (CASB) rules and regulations to negotiated contracts and subcontracts. (FAR Part 30, DFARS Part 230 and 48 CFR 9903.3).
- 5 Identify the contract cost principles and procedures. (FAR Part 31 and DFARS Part 231).
- 6 Given a contracting requirement and market research tools, recognize the essential elements of a market research report.
- 7 Given acquisition situations, determine an appropriate contracting strategy, including the contract type and other incentives.

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Federal Acquisition Certification Courses and Electives

Fundamentals of Cost & Price Analysis (CON 170) Objectives, continued

- 8 Given a contracting scenario, differentiate among financing arrangements, their order of preference, and the situations for use.
- 9 Accurately differentiate between price and cost analysis.
- 10 Pursuant to FAR 15.4, accurately differentiate the price analysis techniques.
- 11 Given a contracting scenario examine price-related factors.
- 12 Pursuant to FAR 15.4, accurately perform proposal analysis.
- 13 Assuming an advisory role in evaluating acquisition proposals, successfully summarize the contractor business systems that must be found compliant for the award and payment of government contracts.
- 14 Given an acquisition situation, successfully differentiate between direct and indirect costs.
- 15 Assuming an advisory role in evaluating acquisition proposals, successfully summarize the evaluation of direct material and subcontract costs.
- 16 Assuming an advisory role in evaluating acquisition proposals, successfully summarize the evaluation of indirect costs.
- 17 Given a proposal evaluation scenario, demonstrate ability to calculate Facilities Capital Cost of Money (FCCOM).
- 18 Given a proposal evaluation scenario, demonstrate ability to employ the Weighted Guidelines (WGL) for calculating negotiation profit objectives.
- 19 Given a scenario, demonstrate ability to complete a Settlement Action relating to Defective Pricing.
- 20 Use professional negotiation tactics to successfully execute face to face negotiations.

Target Audience: New hires to the Contracting Career Field (Civilian OCC Series 1102).

Prerequisites:

- **Required:** CON 090, Federal Acquisition Regulation (FAR) Fundamentals (Only required if assigned to the Contracting Career Field); CON 127, Contract Management; CLC 057, Performance Based Payments and Value of Cash Flow CLC 058, Introduction to Contract Pricing
- **Recommended:** CLC 024, Basic Math Refresher

Pre-course Assignments:

The course “welcome message” will provide students with a “math refresher” book and self-assessment test. The purpose of these materials is to enable students to refresh their basic math skills and take a self-test before attending the course. The welcome message will encourage students to take the self-assessment, and consider deferring their attendance in the course if they have difficulty with the math refresher material.

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Intermediate Cost and Price Analysis (CON 270)

Days: 10 CLPs: 80

Course Purpose:

Intermediate Cost and Price Analysis continues to build upon the fundamental contract pricing principles covered in the Level I Contracting curriculum, Contract Pricing Reference Guide, and DOD Policy. The course is divided into three segments addressing contract pricing issues from a Pre-Award, Negotiation Preparation-Award, and Post-Award perspective. In the course, the students will be introduced to quantitative techniques and tools used to quantify and facilitate decision making in determining a fair and reasonable price. Students will apply various cost analysis techniques and quantitative tools to analyze a contractor's cost proposal and to develop a government negotiation range and objective. The course is designed to prepare students for follow on DAWIA Level II certification courses, serve as a gateway into more advanced targeted contract pricing courses, and give the students some practical tools in pricing government contracts. The ultimate objective of the course is to help students become better business advisors in developing contract arrangements that are in the best interest of the government.

Terminal Learning Objectives:

- 1 Given a contractor's proposal information, develop an Excel spreadsheet to model a proposal
- 2 Given market research and proposed information from offeror(s), using sampling data, select the appropriate statistical information to use in facilitating the decision-making process.
- 3 Assuming an advisory role in evaluating acquisition proposals, successfully summarize the development, assumptions, application and risk of Cost Estimating Relationships (CERs).
- 4 Given market research and proposed information from offeror(s), using historical data and regression analysis, select the appropriate statistical information to use in facilitating the decision making-process.
- 5 Given market research and proposed information from offeror(s), using historical data and estimating factors, select the appropriate statistical information to use in facilitating the decision making-process.
- 6 Given market research and proposed information from offeror(s), using historical data and improvement curve analysis, select the appropriate statistical information to use in facilitating the decision-making process.
- 7 Given market research and proposed information from offeror(s), using historical data determine the impact of Variations in Quantity
- 8 Given a Point Estimate (contract cost, ceiling price) analyze associated cost risk.

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Federal Acquisition Certification Courses and Electives

Terminal Learning Objectives (CON 270), continued

- 9 Give an acquisition requirement, identify the appropriate incentive contract type arrangement to meet the customer's needs and that will motivate the contractor to perform in the best interest of the government.
- 10 Given a contract type in a competitive environment, explain the issues and factors to be considered when performing a cost realism analysis.
- 11 Given a proposed contract change identify issues and factors to be considered in developing the government's negotiation objective for a contract equitable adjustment
- 12 Given a contract termination, identify issues and factors to be considered in pricing a termination settlement.

Target Audience:

Contracting series GS1102 and military equivalents with authority to award or administer contracts above the Simplified Acquisition Threshold

Prerequisites:

CON 170, Fundamentals of Cost and Price Analysis; CLC 056, Analyzing Contract Costs Introduction to Contract Pricing. CLC 024, Basic Math Tutorial and a basic proficiency in Excel are recommended.

Pre-course Assignments:

Excel, and applications incorporating Excel functions, will be used extensively in CON270. As a self-assessment of your Excel skills, you will be asked to open the Proposal Modeling Practice document and create a spreadsheet with the problem solution. Afterwards, you will be asked to compare your spreadsheet to the Excel file that demonstrates one approach to the problem.

If you are new to Excel, or if you are unfamiliar with the formatting, cell references, and formulas used in the enclosed solution, then you will be asked to select the following hyperlink to access a Microsoft Excel tutorial on creating workbooks. There is an additional link within the tutorial to access separate training on cell references and formulas. There will be graded assessments in the course requiring the use of Excel.

<http://office.microsoft.com/en-us/excel-help/get-to-know-excel-2007-create-your-first-workbook-RZ010076674.aspx>

The exercise (Pre-Course Proposal Modeling Practice.docx) will hopefully encourage you to develop at least a basic level of Excel familiarity and thereby reduce some of the burden on instructors having to remediate students in the classroom.

Details will be provided 30 days prior to the class start date.

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Federal Acquisition Certification Courses and Electives

Source Selection and Administration of Service Contracts (CON 280)

Days: 10 CLPs: 96

Course Purpose:

This course builds on the foundation established through the Level I curriculum and the course prerequisites. The primary focus is on the acquisition of services under FAR Part 15 procedures, with an emphasis on performance-based acquisitions (PBA) for services, contract types, contract incentives, source selection, and contract administration. Students will learn the fundamentals of a performance based service acquisition -- from acquisition planning to contract closeout through a realistic case study. The course takes students through the solicitation process using the mandatory DoD Source Selection Procedures. Students will prepare contractual documents, and develop and deliver high-level source selection briefings with recommendations for contract award.

Course Objectives

- 1 Given a complex services requirement, identify the appropriate source selection team roles and responsibilities, to include government and non-government advisors.
- 2 Using the results of market research, assess the industry's environment and determine availability of sources
- 3 Utilizing the DAU Performance Requirements Roadmap and results of a comprehensive market research generate PBA metrics mirroring best commercial practices
- 4 Given a complex services requirement, determine appropriate methods of communication employed by the acquisition team
- 5 Given a complex services requirement and market research results, decide the appropriate acquisition strategy that maximizes small business participation at the prime and subcontracting levels
- 6 Using the results of an analysis of a given requirement, determine an appropriate performance-based approach that meets the customer's mission requirement
- 7 Given a complex services requirement and using the results of an in-depth market research report, construct relevant elements of an acquisition plan IAW FAR and DFARS
- 8 Given a complex services requirements package, examine appropriate sections of a solicitation in accordance with application laws, regulations, policies, acquisition plan and source selection plan

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Source Selection and Administration of Service Contracts (CON 280) Course Objectives, continued

- 9 Given a complex services requirement, construct a source selection plan that meets all public law, regulations, policy, and other guidelines
- 10 Given a contract requirement, accurately assess the financial implications of various types of contract and incentive arrangements
- 11 Given a complex services requirement, evaluate incentive arrangements, for adherence to regulation, policy and guidance
- 12 Given a complex services acquisition situation, appropriately apply the necessary Government funding provisions
- 13 In a competitive negotiated contracting environment, determine the competitive range based on FAR and other guidance
- 14 Given a complex services acquisition situation evaluate several contractor proposals to determine contract award
- 15 After establishment of a competitive range, prepare for negotiations/discussions in accordance with FAR and DFARS
- 16 Using the standards for contractor responsibility in FAR Part 9.1, discuss the contractor responsibility process prior to contract award
- 17 In a competitive contracting environment and using the DoD source selection procedures, recommend the best value proposal to meet mission requirement
- 18 Based on the results of the SSEB & SSAC evaluation reports and the SSDD, determine what information to include in debriefings and differentiate between protest processes
- 19 After contract award, determine the appropriate forum to address customer and contractor's responsibilities for successful performance of the contract
- 20 After contract award, develop contract administration requirements in accordance with FAR and DFARS
- 21 After contract award, perform contract administrative functions in accordance with FAR and DFARS
- 22 Determine the need for contract modifications in accordance with contract terms and conditions and FAR and DFARS
- 23 After contract performance is complete, determine contract close-out procedures as they relate to services and the case study
- 24 Given a complex services acquisition, appropriately examine the provisions of the allowable cost and payments provision
- 25 Given a complex services acquisition, appropriately evaluate the provisions of the incentive fee provisions
- 26 Given a complex Contracting issue, develop, on an individual basis, a written research paper to be presented orally to the class

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Source Selection and Administration of Service Contracts (CON 280), continued

Target Audience

This course is designed for Level I certified contracting personnel with at least 2 years of contracting experience in the Contracting Career Field (Civilian OCC Series 1102) seeking Level II certification.

Prerequisites

ACQ 101, Fundamentals of Systems Acquisition Management CLC 051, Managing Government Property in the Possession of Contractors CLC 056, Analyzing Contract Costs CLC 057, Performance Based Payments and Value of Cash Flow CON 200, Business Decisions for Contracting CON 216, Legal Considerations in Contracting CON 270, Intermediate Cost and Price Analysis HBS 428, Negotiating

Pre-course Assignments

Students must complete all electronic assignments prior to attending this course. These assignments represent 18 percent of the student's grade. Details will be provided 30 days prior to the class start date.

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Contract Administration and Negotiation Techniques in a Supply Environment (CON 290)

Days: 10 CLPs: 80

Course Purpose:

In this case-based course, students apply Contracting concepts and techniques learned in prerequisite courses to meet customer supply requirements and resolve complex Contracting issues. Special emphasis is placed on applying legal concepts from CON 216, intermediate pricing concepts from CON 270, and negotiation techniques from HBS 428. Students experience the full spectrum of Contracting processes and issues by following a supply requirement through all phases of the acquisition life cycle, from acquisition planning through contract close-out. Research, analysis, and communication skills are honed through development and presentation of a critical thinking project requiring in-depth focus on one area of Contracting. Negotiation skills are sharpened through active student participation in two simulated contract negotiations

Course Objectives:

- 1 Given a complex fiscal law issue, and working in a team environment, complete the necessary steps to successfully resolve the issue.
- 2 Given an agency's contract requirement and market research data, make an accurate commerciality determination.
- 3 For a given fact pattern, determine whether to contract without providing for full and open competition.
- 4 For a given agency requirement and supporting market research data, evaluate a given Justification & Approval (J&A) for FAR Subpart 6.3 compliance.
- 5 Given an agency requirement, determine whether an undefinitized contract action (UCA) should be used to mitigate contract schedule risk.
- 6 Given an agency requirement and supporting market research data, select an appropriate contracting method.
- 7 Given an agency requirement and supporting market research data, select a contract type & incentive structure that motivates contractor performance while mitigating contract risks.
- 8 Given an agency requirement and contract type, select appropriate type of financing.

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Contract Administration and Negotiation Techniques in a Supply Environment (CON 290) Course Objectives, continued

- 9 Given an agency requirement and contract type, determine whether contract options should be included in a contract.
- 10 Identify the major elements and components of a given solicitation.
- 11 Given a fact pattern, select the appropriate DFARS data rights license.
- 12 For a given scenario, use cost analysis to evaluate the reasonableness of a contractor's proposal.
- 13 Identify basic negotiation techniques recommended for negotiating Government contracts.
- 14 For a given contractor CPFF completion proposal and related Government audit and technical evaluation documentation, establish a Government pre-negotiation objective.
- 15 For a given negotiation, conduct fact-finding necessary to prepare for the negotiation scenario.
- 16 For a given previously developed pre-negotiation objective, orally present the objective to a business clearance official to obtain approval to start negotiations.
- 17 With a given support team, conduct face-to-face contract negotiations based on an approved pre-negotiation objective.
- 18 Calculate the point of total assumption (PTA) for a given fixed-price incentive firm (FPIF) contract.
- 19 For a given fact scenario, determine whether a contractor's request for performance-based payments should be made.
- 20 For a given fact scenario, evaluate potential bases for, and Government defenses to, a contractor protest.
- 21 For a given contract, develop a contract administration plan.
- 22 For a given contract, conduct a post-award orientation.
- 23 For a given fact scenario, evaluate available Government remedies for nonconforming goods.
- 24 For a given fact scenario, determine whether fraud has potentially occurred.
- 25 For a given fact scenario, determine whether a contemplated contract change can be made using the contract's Changes Clause.
- 26 For a given fact scenario, determine what alternatives are available to make a contemplated contract change if the change is not within the scope of the contract.
- 27 For a given fact scenario, evaluate whether a given contractor request for equitable adjustment proposal is reasonable.
- 28 For a given scenario, calculate the amount of a contractor's lost efficiency resulting from a contract change.
- 29 For a given contractor request for equitable adjustment, conduct face-to-face negotiations to determine the equitable adjustment terms.
- 30 Given a fact scenario, identify applicable the rules and steps for submitting and processing a contractor claim under the Contract Disputes Act.

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Federal Acquisition Certification Courses and Electives

Contract Administration and Negotiation Techniques in a Supply Environment (CON 290) Course Objectives, continued

- 31 For a given fact scenario, determine whether defective pricing has occurred.
- 32 For a given scenario, evaluate the Government termination options and associated settlement methods and procedures available to the Government.
- 33 Given a set of contract performance facts and Government comments, evaluate contractor performance after contract completion.
- 34 Given the FPIF elements and relevant cost data, calculate the final price and final profit under an FPIF contract.
- 35 For a given fact scenario, determine whether all requirements have been met to close out a Government contract.
- 36 Research new issues and initiatives in DoD contracting

Target Audience:

This course is designed for Intermediate-level contracting personnel who are Level I certified in Contracting and have a minimum of 2 years of contracting experience.

Prerequisites:

ACQ 101, Fundamentals of Systems Acquisition Management CLC 051, Managing Government Property in the Possession of Contractors CLC 056, Analyzing Contract Costs CLC 057, Performance Based Payments and Value of Cash Flow CON 200, Business Decisions for Contracting CON 216, Legal Considerations in Contracting CON 270, Intermediate Cost and Price Analysis HBS 428, Negotiating

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Contracting for Decision Makers (CON 360)

Days: 10 CLPs: 80

Course Purpose:

This course provides the contracting professional the training necessary for the Level III Contracting certification course. Through realistic scenario-based learning, students work individually and in teams to practice developing sound business solutions as a valued strategic and expert business advisor. Students will learn to analyze complex contracting situations with emphasis on critical thinking, problem solving, research, and risk reduction. Student course work is designed to contribute to real solutions on real acquisition problems to senior leadership and local supervisors.

Course Objectives:

Students who successfully complete this AMCI equivalent course will be able to:

- apply critical thinking skills to a contracting-related problem
 - apply problem solving methods to use in a contracting-related problem
 - apply risk mitigation techniques to use in a contracting-related problem
 - make a decision on a contracting dilemma that complies with rules of ethics in contracting
 - apply leadership skills to use in a complex contracting issue
 - contribute in a collaborative environment by providing timely written and verbal feedback to team members and the class
 - successfully identify various methods of motivating and alleviating employee stress for individuals who are dealing with constant change in the contracting work environment.
 - apply an industry and senior Government contracting leader perspective to an assigned contracting policy issue
 - manage information and knowledge for currency in acquisition and contracting in order to prepare and deliver presentations on current issues in contracting
-

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Contracting for Decision Makers (CON 360), continued

Methodology: Lecture; Guest speaker presentations; Team discussions and facilitation; Group presentations; Exercises

Course Outline:

- Welcome/Introduction to CON 360
- Team Building
 - The Briefing
 - Critical Thinking
- Problem Solving
- Risk Management
- Leadership
- Managing Change & Transition
- Hot Topics
- Customer Focus
- Conflict Management
- Senior leadership presentation (SLP) Peer Reviews
- Ethics
- Presentations & Course Wrap Up

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Contracting Officer's Representative (COR 222)

Days: 5 CLPs: 40

Course Purpose:

This certified DAU-equivalent course is specifically designed for Contracting Officer's Representatives (CORs) who are responsible for assuring that contractors are performing the technical portion of their job. COR 222 will provide CORs the breadth of knowledge required to perform their role, including knowledge related to COR roles and responsibilities, as well as fundamentals of contracting regulations, types, phases, and other elements; awareness of ethical, legal, and cultural factors that impact COR responsibilities; and information necessary to effectively evaluate situations, apply knowledge gained, and make correct decisions to carry out COR responsibilities and scenarios found in the contract planning, contract formation and contract administration phases.

Learning Objectives:

1. Recognize the duties, limitations and authority of the COR.
2. Identify key laws and regulations that address fraud, waste and abuse and ethical considerations in federal contracting
3. Recognize COR responsibilities in acquisition mission support planning
4. Recognize the COR responsibilities in the contract award process
5. Recognize the COR's role in tracking contract expenditures
6. Recognize the COR's role in tracking the contract schedule
7. Evaluate proposed changes under the contract so that the best interests of the government are protected
8. Recognize the importance of the COR as a representative of the Contracting Officer during performance of the contract
9. Review technical submittals to ensure compliance with statement of work and contract objectives
10. Describe the COR's responsibilities in inspecting and accepting goods and services.
11. Given a contract action, identify the delegated technical functions for which the COR is responsible.
12. Describe the administrative duties of the COR as outlined in the delegation letter.
13. Identify the unique characteristics of a construction contract.
14. Identify the unique characteristics of contracts in major systems and R&D acquisitions.

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Contracting Officer's Representative (COR 222) continued

Methodology:

Limited lecture/facilitated discussion; Research FAR and web sources; Reading assignments; Interactive activities; Case studies; Exercises; Homework** assignments

**The method of instruction used in FCN 190 is based on the Thayer method. The Thayer method is unique in that it requires students to teach themselves the material prior to class (as homework) and the instructor's role is to explain the material in class if there are any questions. Further, students are held accountable for their learning by being assessed on a daily basis.

Target Audience:

This course is designed for anyone currently serving as or training to become a Contracting Officer's Representative

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Part 2: Contracting Electives

- Changes Under Government Contracts
- Contract Closeout
- Contract Management
- COR Certification Training (FCR 201)
- COR Refresher Training
- Evaluating a Contractor's Performance
- Federal Appropriations Law
- Federal Budgeting Process
- Government Contract Law
- Grants & Cooperative Agreement Management
- Performance Based Acquisition (PBA)
- Simplified Acquisition Procedures
- Source Selection Team Training
- Understanding and Applying Federal Travel Regulations
- Writing Effective Statements of Work

Part 3: Professional Development Electives

- Effective Presentation Techniques
- Technical Writing
- Communication Skills
- Leading Teams & Groups
- Team Building
- Leadership Skills for Non-Supervisors
- Time Management
- Decision Making & Problem Solving

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Changes Under Government Contracts

Days: 3 **CLPs:** 24

Course Purpose:

One of the least understood functions in the federal acquisition cycle are changes under government contracts and equitable adjustments. These important tasks are also some of the least understood, but most important of a Contracting Officer's functions. If government personnel do not fully understand these critical functions, protests, claims and disputes can easily result.

This in-depth, hands- on course is geared for the contracting professional who is responsible for the changes and equitable adjustments of Government contracts

This course will provide an understanding of the federal requirements for changes, constructive changes, contract interpretation and equitable adjustments. Students will learn the key players in the changes process and gain an understanding of the principles and strategies. Real life GAO and BCA case studies are used along with lecture and class discussions to enable the students to return to their workplace with the knowledge and ability to perform contract changes.

Learning Objectives

- Understand changes and equitable adjustments in the Federal environment
- Understand how to effectively utilize the various Changes Clauses
- Know the players involved in contract changes and equitable adjustments
- Understand constructive changes and how to prevent them
- Gain the ability to process unilateral and bilateral modifications
- Understand in-scope and out-of-scope changes
- Learn how to properly interpret a government contractor
- Gain an understanding of which FAR clauses trigger an equitable adjustment
- Understand how to price equitable adjustments

Target Audience: Contracts Specialists and Officers; Government Contracts Managers; Government Project Officers; CORs and COTRs, Contract Administrators; Procurement Executives; Budget and Finance Officers; General Counsel

Prerequisites: None

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Contract Closeout

Days: 2 CLPs: 16

Course Purpose:

One of the least performed functions in the federal acquisition cycle is contract closeout. This important task is also one of the least understood, but simplest to perform. The closeout process is one that protects the government's rights and can lead to the recovery of government funds.

This in-depth, hands-on course is geared for the contracting professional who is responsible for the closeout of contracts and the recovery of funds and property.

This course will provide an understanding of the federal requirements for contract closeout, as well as closeout planning and processes. Students will learn the key players in the closeout process and gain an understanding of contract closeout principles and strategies. Real life examples and forms will enable the students to return to their workplace with the knowledge and ability to perform contract closeout.

This course is taught by a knowledgeable, skilled instructor, having a wealth of hands-on, practical experience in performing and presenting this topic. This course will use lectures, class exercises, and assignments to work on while away from class. This approach of participative learning will ensure that each student returns to work with improved skills and confidence in applying the lessons learned.

Learning Objectives

- Understand the benefits of contract closeout to the government and prime contractors
- Understand the federal regulatory requirements
- Be able to apply contract closeout process in your home agency
- Know the players involved in contract closeout
- Become aware of the causes of delays in contract closeout and some techniques to counter them
- Understand how to use quick and administrative closeout
- Be aware of some recommendations for making contract closeout easier

Target Audience: Contracts Specialists and Officers; Government Contracts Managers; Government Project Officers; CORs and COTRs; Contract Administrators; Procurement Executives; Budget and Finance Officers; General Counsel

Prerequisites: None

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Contract Administration

Days: 3 CLPs: 24

Course Purpose:

Contract administration is one of the most important functions in the entire acquisition process. Proper management and oversight of the contract is vital to the success of the overall contract and ensures that the government receives consideration and fulfillment of its original requirement. Contract administration is a means by which the government's rights are protected and government funds are used properly and appropriately. This hands-on course is geared for the contracting professional who is responsible for contract management and oversight.

This course provides an understanding of the federal requirements for contract administration and performance. Students will learn the key players in the contract administration and management process and gain an understanding of the key functions and responsibilities. This course effectively uses lectures, real life examples, exercises, discussions, and pertinent illustrations to enhance learning and to enable the students to return to their workplace with the knowledge and ability to perform contract administration. Additionally, it is designed to address key competencies and business acumen that supports the growth and development of the contracting professional. In turn, these approaches will serve as enablers to ensure that each student returns to work with improved skills and confidence in accomplishing their jobs.

Learning Objectives:

At the end of this course, the students will

- Identify the fundamental concepts of contract administration
- Review the foundational principles to managing a contract
- Understand the preparation post-award contract administration
- Describe the procedures for contract monitoring and documentation
- Determine the appropriate types and magnitude of contract surveillance
- Discuss contract modifications and requests for equitable adjustments
- Understand the use and impacts of government property
- Review financial management procedures in contract administration
- Understand the policies associated with contractor performance and inspection and acceptance
- Know the rules and reasons for prime contract termination
- Review procedures to close a contract

Target Audience: Contracts Specialists and Officers; Government Contracts Managers; Government Project Officers; CORs and COTRs; Contract Administrators; Procurement Executives; Budget and Finance Officers; General Counsel

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Contracting Officer's Representative (COR) Certification Training (FCR201)

Days: 5 CLPs: 40

Course Purpose:

Technical personnel play a vital role in acquiring equipment, systems, and support services by contract for the Government. They prepare the work statement; evaluate proposals; recommend source selection; and, as the appointed contracting officer's representative (COR), review, guide and direct the contractor's performance. Program success relies upon their informed and timely input. Effective contracting requires that technical personnel possess and correctly apply technical and administrative skills. Most technical personnel become involved in acquisitions because of their technical expertise. This course looks to improving agency acquisitions and contractor performance by enhancing their knowledge and practical application of contracting principles.

Learning Objectives

- Identify their responsibilities in the acquisition process and applicable requirements from the FAR and Agency policy.
- Address key elements of acquisition planning including market research, competition, source selection, contract type, use of indefinite delivery contracts, cost estimating, funding, special considerations for service contracts, logistical considerations, Government-furnished property and information, and security.
- Recognize authorized limitations on full and open competition; develop a justification for other than full and open competition, and support small business set-aside goals and programs.
- Prepare a performance-based work statement, source selection criteria, and technical proposal instructions.
- Observe solicitation constraints including communication with prospective offerors, disclosure of information, and confidentiality.
- Understand their input to the source selection process including the technical evaluation plan, evaluating proposals and reaching an agreement, cost realism and best value analysis, and source selection.
- Plan for quality and schedule assurance, select the appropriate remedy for nonconforming or delinquent performance, and prepare contractor performance evaluation reports.
- Support timely execution of contract modifications and avoid unauthorized changes.
- Provide timely technical direction within the scope of the contract requirements.
- Review payment requests and provide timely feedback.
- Know and appreciate standards of procurement ethics including areas of prescribed conduct under the Procurement Integrity Act and criminal conflict of interest statutes.

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Contracting Officer's Representative (COR) Certification Training (FCR201), continued

Target Audience: Contracts Specialists and Officers; Government Contracts Managers; Government Project Officers; CORs and COTRs; Contract Administrators; Procurement Executives; Budget and Finance Officers; General Counsel

Prerequisites: None

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

COR Refresher Training

Days: 1 CLPs: 8

Course Purpose:

The COR Refresher course is designed to re-acquaint non-contracting personnel with the federal acquisition process and the changes that have occurred since their initial training class. Additionally there will be discussion on the knowledge and skills they must possess to execute their responsibilities as a representative of the contracting officer. The course will have an overview of the acquisition process and focus on the CORs delegation and responsibilities in addition to ethics in government contracting. The CORs will learn how to do market research, requirement planning, and then development of the statement of work. Additionally they will do case studies to hone their skills in properly monitoring and reporting on the contractor's performance.

Course Objectives

- Provide a review on the COR's role in the acquisition process of developing the requirement and solicitation of offers
 - Develop technical evaluation and source selection requirements
 - Monitor and report contractor performance
 - Identify necessary actions to address unsatisfactory performance
 - Address ethical considerations throughout the contract life-cycle
 - Initiate final payment and close out the contract.
- Identify areas needing improvement or clarification
- Update the COR on current regulations

Topics:

Success stories or Issues

COR Delegation and Responsibilities and COR Duties

Ethics and Procurement Integrity

Overview of the Acquisition Process

Acquisition Planning and Requirement Development

Understanding the types of Contracts

Contract Modifications

Understanding the difference between Personal and Non-Personal contracts

COR's responsibilities for a Performance Based Service Contract

How to respond to Delinquencies by and Disputes with the contractor

Contract Closeout

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Evaluating a Contractor's Performance

Days: 3 CLPs: 24

Course Purpose:

Evaluating contractor performance is one of the most important functions in the entire acquisition process. Providing the level of oversight and surveillance of the contractor ensures the government receives what it has paid and contracted for. Most importantly, assurance that the contract requirement is fulfilled within the cost, schedule, and performance parameter are key. Proper evaluation of contractor performance is a mission imperative that ensures the government's rights are protected and that government funds are used properly and appropriately in the course of vendor performance. This hands-on course is geared for the contracting professional who is responsible for evaluating contractor performance.

Course Objectives

- Understand the importance of evaluating contractor performance
- Discuss the planning and preparation for evaluation to vendor evaluation and monitoring
- Understand key aspects to effectively evaluating contractor performance
- Describe key remedies and corrective measures to performance oversight
- Describe methods to document the results of vendor performance and evaluation

Topics:

- Overview of Contract Process, Policies & Procedures for Efficient Contractor Performance
- Preparing for Proper Performance Planning
- Communication Strategies to Enhance Contractor Performance
- Understanding Changes During Contract Performance
- Strategies to Monitor and Reward Contractor Performance
- Remedies to Improve Contractor Performance
- Government Property Responsibilities During Contractor Performance
- Financial Management Considerations
- Contractor Performance and the Use of Terminations
- Contractor Final Performance: Delivery, Inspection, & Acceptance
- Closure to Performance: The Contract Closeout Process

Target Audience: Contract Specialists; Contracting Officers; Government Contracts Managers; Government Project Officers; CORs; GTM/GTRs; Contract Administrators; Procurement Executives; Budget and Finance Officers; General Counsel

Prerequisites: None

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Federal Appropriations Law

Days: 4 CLPs: 32

Course Purpose:

This course is designed for acquisition and program personnel involved the theory, practice and application of expenditure of appropriated funds under Federal Appropriations Law. It provides an overview and details about Appropriations Law is based upon the Third Edition of the Principles of Federal Appropriations Law (commonly referred to as “The Red Book”) developed by the Government Accountability Office (GAO), revised most recently in July 2010. The main text materials for this course were selected and developed to provide participants with a comprehensive exposure to the subject.

Federal Appropriations Law affects how Departments and agencies operate. In addition to providing technical direction both internally and under contract, these individuals must also be careful not to overstep the laws, regulations and policies of what money to use; how long it is available; and its intended purpose.

As reinforcement of the learning experience, the presenter will assign Appropriations Law two scenarios to groups at the end of the first day. Groups will present a discussion of their respective scenarios during the third and the final day of the course. .

Topics:

- Overview of the Acquisition Process
- The Evolution of Appropriations Law
- The Anti-Deficiency Act
- The Bona Fide Needs Rule
- Application of Appropriations Law
- The GAO Red Book Chapters and Topics
- Scenarios/Group Projects

Target Audience: Agency personnel responsible for the programmatic aspects of contracting including: program managers, Project Officers, CORs, and technical support personnel.

Prerequisites : Basic overall knowledge of the Federal acquisition process, particularly the acquisition planning and contracting phases; This course can serve as a 32-hour elective for Contract Specialists, Contracting Officers, CORs and sub-CORs, or for satisfying part of the Continuous Learning Points requirement of the Federal Acquisition Certification for Contracting personnel (FAC-C); Federal Acquisition Certification for Program and Project Managers (FAC-P/PM); and Federal Acquisition Certification for Contracting Officer’s Representatives (FAC-COR).

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Principles of Federal Appropriations Law

Days: 2 CLPs: 16

Course Purpose:

Federal Appropriations Law affects how Departments and agencies operate. In addition to providing technical direction both internally and under contract, these individuals must also be careful not to overstep the laws, regulations and policies of what money to use; how long it is available; and its intended purpose. This course is designed for acquisition and program personnel involved with the theory, practice and application of expenditure of appropriated funds under Federal Appropriations Law. It provides an overview and details about Appropriations Law, based upon the Third Edition of the Principles of Federal Appropriations Law (commonly referred to as “The Red Book”) developed by the Government Accountability Office (GAO). The main text materials for this course were selected and developed to provide participants with a comprehensive exposure to the subject.

As reinforcement of the learning experience, the presenter will assign Appropriations Law scenarios to groups at the end of the first day. Groups will present a discussion of their respective scenarios during the final day of the course.

Topics:

- Overview of the Acquisition Process
- The Evolution of Appropriations Law
- The Anti-Deficiency Act
- The Bona Fide Needs Rule
- Application of Appropriations Law
- The GAO Red Book Chapters and Topics
- Scenarios/Group Projects

Target Audience: Agency personnel responsible for the programmatic aspects of contracting including: program managers, Project Officers, CORs, and technical support personnel.

Prerequisites: Basic overall knowledge of the Federal acquisition process, particularly the acquisition planning and contracting phases.

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Government Contract Law

Days: 3 CLPs: 24

Course Purpose:

This course can be delivered as basic or advanced, and is designed for GS1102 Contract Specialists who have completed Level I contracting training and have two years of contracting experience. This course focuses on legal considerations in the procurement process and introduces basic principles and sources of law relevant to procurement, including fiscal law. Students will address legal issues encountered in contracting such as protests, assignments of claims, disputes, fraud, contractor debt, performance issues, and contract termination.

Outline:

Course Introduction

- Overview
- Learning Objectives:

Introduction to Contract Law

- Legal Process
- Sources of Procurement Law
- Contract Formation
- Authority and Delegation
- Government Contract Formation

Fiscal Law

- Overview
- Purpose Funding Restrictions
- Time Restrictions
- Amount Restrictions
- Obligations

Intellectual Property

- Overview
- General Characteristics of Property
- Bailment
- Bailments in Government Contracts
- Government Property
- Fixtures
- Facilities
- Intellectual Property – Protection, Technical Data, Proprietary Information, Non-FAR Transactions and Technology Transfer
- Government Rights
- Authorities

Protests

- Background
- Protests to the Agency
- Protests to the GAO
- Protests to the Federal Courts

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Government Contract Law, continued

Assignment of Claims

- Introduction
- Assignment of Claims Process

Contract Performance

- Contract Interpretation
- Acceptance and Inspection
- Changes

Claims and Disputes

- Dispute Process
- Equitable Adjustment and Damages
- Claims
- Appeals
- Alternative Dispute Resolution

Contract Fraud

- Procurement Fraud
- Criminal and Civil Statutes
- Agency Responsibility
- Suspension and Debarment

Contract Terminations

- Termination for Convenience
- Termination for Default/Cause

Contractor Debt

- Reasons for Contractor Debt
- Debt Collection Act
- Debt Recovery
- Debt Collection Actions
- Unilateral Debt Collection

Review

Final Exam

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Federal Budget Process

Days: 2 CLPs: 16

Course Purpose:

This 2-day course shall provide students with a basic introduction to the Federal Budget Process as it relates to the agency's budgeting requirements, the various budget phases to develop a comprehensive budget, the roles and impacts of Government organizations and public interest groups/lobbyists, the Federal budget impact on the U.S. economy, and the meaning of budget/accounting terms with respect to agency functions and activities. The course shall allow students the ability to be able to identify the skills necessary to formulate and execute a program office budget. The topics covered shall include but are not limited to: the process of planning, programming, budgeting, and budget execution; as well as the congressional enactment process.

Outline:

- **Course Introduction and Objectives**
- **The Federal Budget Process Intro**
 - The Executive Office of the President
 - Office of Management and Budget – OMB Circular A-11
 - The Budget Defined
 - Legal Requirements to Prepare the Federal Budget
 - Information Provided by the Annual Budget
 - Agencies Covered by the Budget
- **Budget Terms and Concepts**
- **Overview of the Budget Process**
 - The Budget and Accounting Act of 1921
 - The Government Performance and Results Act of 1993
 - The Anti-deficiency Acts of 1921 and 1950
 - Six Phases of the Federal Budget Process
 - Budget Formulation and Transmittal
 - Audits and Reviews

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Federal Budget Process, continued

- **Budget Planning and Preparation**
 - Agency Submission
 - Department Budget Office
 - Budget Office Responsibilities
 - Program Fund Administrator
 - Program Fund Manager
- **Budgeting and Financial Planning**
 - Six General Steps
 - Spend Plan
 - Determining Requirements
 - Develop a Budget Plan
- **The Congressional Enactment Process**
 - Historical Perspective
 - The Congressional “Power of the Purse”
 - Congressional Authorization and Appropriation
 - Cornerstone of Congressional Action
 - The Anti-deficiency Act
 - Congressional Actions
- **Budget Execution**
 - Budget Execution Phase
 - Budget Authority
 - Spending under Continuing Resolution (CR)
 - Budget Execution and Control
- **Budget Guidance**
 - Agency Authorization and Appropriation
 - Contract Authority
 - Fees and Commissions
 - Trust Funds
 - Account Closing
- **Questions and Course Quiz**

Target Audience: Federal civilian employees and contractors who would benefit from an overview of the Federal budget process and procedures.

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Grants & Agreements Management Course

Days: 5 CLPs: 40

Course Purpose:

Grants and Agreements Management presents the foundational knowledge required to work as a grants officer. Course participants learn about grants, cooperative agreements, and technology investment agreements. The course also provides a brief overview of other types of assistance transactions. Please note that this course does not address other transactions used to carry out prototype projects, which involve acquisitions instead of assistance, and therefore falls out of the scope of this course.

Learning Objectives:

- Given reading materials, discuss historical and current laws applicable to grants and agreements.
- Given a scenario, select the most appropriate instrument (grant, agreement, other assistance document, or procurement contract) in accordance with applicable laws, regulations, and other appropriate references.
- Given applicable Federal statutes, regulations, and a scenario, select the appropriate steps for a specific non-procurement instrument during the pre-award assistance process
- Given applicable Federal statutes, regulations, and scenario, select the appropriate steps for a specific non-procurement instrument during the award phase
- Given applicable Federal statutes, regulations, and scenario, select the appropriate steps for a specific non-procurement instrument during the post award phase.
- Given an objective (Congressional, public benefit, or other) and request for Government support (money, technology, data, cost sharing, or other resources), justify the appropriate action for Government involvement (grant, agreement, Technology Investment Agreement (TIA), or other transaction).

Target Audience: This course is designed for personnel who will be substantially involved in pre-award and post-award assistance processes. Participants will generally be grants specialists and personnel identified by their organizations as being in a career path to become Grants Officers.

Prerequisites: Required: None Recommended: Level I certification in Contracting

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Performance-Based Acquisitions (PBA)

Days: 3 **CLPs:** 24

Course Purpose:

Performance-Based Acquisition is a process designed to hold the contractor accountable for providing solutions to the acquisition objective while operating in a results-oriented set of outcomes. It describes the services/items to be bought and is the baseline for preparing and evaluating bids and proposals and monitoring day-to-day contractor performance. This course emphasizes the procedures and steps in the Federal acquisition process and how they relate to the development of clear, complete, and concise PBWSs.

Topics:

- Acquisition Planning for PBAs
- Identifying roles, responsibilities, and teaming arrangements in developing PBAs
- Acquisition Methods in Using PBAs
- Socio-economic Factors and Labor Laws in Implementing PBAs
- Identifying essential elements and their interrelationships in the PBA process
- Apply step-by-step procedures to capture performance-based elements including strategy, job analysis, and work breakdown structures
- Perform an Activity Analysis to capture necessary work scheduling, procedures, and performance times
- Screen out unnecessary detailed design restrictions
- Specify deliverables including hardware, software, and data items
- Create outcome-based acceptance criteria linked to monetary and non-monetary performance incentives
- Prepare a Quality Assurance Surveillance Plan
- Implementing and Administering Inspection and Acceptance Criteria for PBAs
- Formatting PBA information for different types of acquisitions
- Disputes under PBAs
- Ensuring Contract Performance and Contract Closeout
- Avoid and eliminate common writing errors

Target Audience: Agency personnel responsible for the preparing and reviewing PBWSs; Contract Specialists, Contracting Officers, CORs and sub-CORs, or for satisfying part of the Continuous Learning Points requirement of the Federal Acquisition Certification for Contracting personnel (FAC-C); Federal Acquisition Certification for Program and Project Managers (FAC-P/PM); and Federal Acquisition Certification for Contracting Officer's Representatives (FAC-COR).

Class Format: Lecture, class exercises, quizzes, final exam

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Simplified Acquisition Procedures

Days: 5 CLPs: 40

Course Purpose:

This course provides in-depth coverage on the full range of acquisition policies and procedures with a concentration on simplified acquisition. The course emphasizes the well-established concepts, rules, and processes of the system and includes information and tools necessary to manage purchase requests, identify appropriate sources, evaluate pricing information, and provide appropriate follow-up and payment for both commercial and non-commercial items and services. Cases, exercises, and scenarios are used in the class to provide real world examples of the application of principles taught in a classroom setting. The course is primarily designed for non-contracting professionals who support the acquisition system in developing requirements, accepting products and services and overseeing contractor performance, as well as new and seasoned contracting professionals who would benefit from a refresher on current policies and procedures.

Course Objectives:

- Provide non-contracting personnel and contracting professionals an understanding of the statutory and procedural requirements of the FAR for Simplified Acquisition and the roles and responsibilities of key participants in the System
- Review some of the basic principles of the Federal Acquisition System in the context of Simplified Acquisition
- Gain an appreciation for the statutory and regulatory framework of the FAR and the Agency's procurement process for SAP
- Use cases and exercises to understand the key processes, policies, and rights and remedies of the parties in contract formation and execution
- Provide information & tools necessary for the effective management of purchases.

Topics:

- Introduction to the Seminar
- Introduction to Federal Acquisition
- Legal & Regulatory Basis
- Roles & Responsibilities
- Legal Concepts
- Federal Policy Matters Affecting the Acquisition System

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Simplified Acquisition Procedures Topics, continued

- Requirements and Required Sources
 - Federal Supply Schedules
 - Acquisition Planning
 - Market Research
- Procurement Methods
 - Simplified Acquisition Procedures
 - Sealed Bidding
 - Competitive Negotiation
 - Commercial Item Acquisition
- Contract Types
 - Pricing Issues
 - Cost Accounting Standards
- Cost Principles
 - Protests
- Contract Administration
 - Rules of Interpretation
 - Changes
 - Modifications
 - Differing Site Conditions
 - Delays & Suspensions
- Pricing Contract Adjustments
- Government Property
- Inspection and Acceptance
 - Termination for Convenience
 - Termination for Default
- Disputes
 - Case
 - Summary

Target Audience: This course is required for those pursuing Level I certification in the Purchasing career field. It may also be taken by those in the Contracting career field seeking Core Plus training.

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Source Selection

Days: 2 CLPs: 16

Course Purpose:

Today, more than ever before, the process of evaluating and selecting a contractor is both judgmental and exacting. Moreover, source selection decisions are subject to closer scrutiny as contractors seek successful outcomes (i.e., award) of a contract. Offerors are not willing to commit substantial time and personnel and financial resources only to “come in second” or lower in the source selection rankings. Protests against Federal contract awards are at their highest level in over ten years. Therefore, Federal departments and agencies must develop exacting source selection criteria that will withstand scrutiny from both internal and external interests. This course emphasizes the procedures and steps in the Federal acquisition process and how they relate to the development of clear, complete, and concise source selection evaluation criteria and decision making.

Topics:

- Overview of the Federal Acquisition Process
- Terminology for Source Selection
- The Source Selection Plan
- Developing Evaluation Factors
- Technical Evaluations
- Competitive Range
- Selection
- Contract Award

Target Audience: Agency personnel responsible for any phase of the source selection process.

Class Format: Lecture, class exercises, review discussion

Prerequisites: This is an intermediate course and is best suited for participants with some experience and training in acquisition.

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Writing Effective Statements of Work

Days: 3 CLPs: 24

Course Purpose:

This course is designed to improve agency acquisitions and contractor performance by learning how to prepare effective work statements. A well-written work statement allows offerors to propose more intelligently and avoid building contingency costs into the price.

Topics:

- Acquisition process and legal requirements
- Developing a procurement request package including a work statement, cost estimate, and source selection criteria
- Writing work statements to encourage competition
- Writing work statements for Required Sources and Small Business/8(a) set-asides
- Types of work statements: functional; performance; and detail design
- Achieving maximum competition through the Statement of Work
- Communication with prospective offerors and confidentiality requirements
- Using the work statement to evaluate offers and select a source
- Techniques for monitoring quality and schedule requirements in the work statement
- Remedies for nonconforming or delinquent performance
- Modifying the contract work statement to avoid unauthorized changes

Target Audience: Agency personnel responsible for preparing work statements including Contracting Officers, Contract Specialists, Program Managers and Contracting Officer's Representatives.

Class Format: Lecture, class exercises

Prerequisites: None

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Federal Travel Regulations

Days: 2 CLPs: 16

Course Purpose:

This course is to acquaint staff members with Federal Travel Regulations (FTR) related to Temporary Duty (TDY) travel. Too often staff members are left to learn FTR regulations on their own. This class seeks to overcome the challenges of “dry” material in an interactive forum. The class will consist of lecture, group discussions and activities to review the information in Chapters 300 and 301.

The goal of this course is to train DOT staff on the proper use of the FTR. As staff members become more familiar with using the FTR appropriately they will make fewer mistakes in planning travel, filing travel reports and ultimately reduce DOT expenditures for travel.

Learning Objectives:

- Adhere with current FTR for TDY
- Distinguish between FTR & agency travel requirements
- Identify official responsibilities for authorizations
- Identify when actual expense authorization is required
- Determine who is eligible for TDY allowance
- Determine what expenses are paid by the agency
- Avoid costly mistakes
- Determine authorized travel allowances
- Identify and compute per diems
- Calculate actual expenses
- Save travel money
- Determine most advantageous mode of travel

Target Audience: Staff members tasked with processing Temporary Duty (TDY) travel claims

Prerequisites: None

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Effective Presentations

Days: 2 CLPs: 16

Course Purpose:

Audiences judge presenters even before they begin to speak, and they continue to evaluate throughout the entire presentation. Most speakers concentrate almost exclusively on the words they deliver, but audiences concentrate on how those words are delivered, sequenced, described, illustrated, and emphasized.

When a speaker doesn't support his words with his delivery skills, the impact of the message is weakened – or in worst case – lost.

When presenting ideas and recommendations to any government agency, it is essential to quickly and clearly: Make Your Point, Back It Up, Call for Action, and Move On. An effective presenter must be a good teacher by knowing the expectations and limitations of his students – the audience – and by developing and executing actions and materials that make the interaction valuable and beneficial to the audience members, not simply easy and convenient for the presenter.

Effective presenters must understand the Communication Process and how information is selected, organized, and interpreted in order to achieve mutual goals and expectations.

This 2-day “hands-on” program will provide skills and techniques that participants will be able to use immediately to:

- Create Change by “selling” ideas, concepts, and procedures
- Share Information by delivering messages that are clear, complete, and concise
- Lead Others by sharing their vision, goals, and strategies.

The program employs a wide variety of techniques including lecture, demonstration, practice, coaching with immediate feedback, video recording, playback and evaluation.

Learning Objectives

- Appropriate Sequencing of material: Audiences are impatient, and they want relevant information immediately. When material and information are not properly organized, audiences become restless, and often, hostile. Keep them “in sync” with you, your ideas, and your expectations.
- Significance of Audience Analysis to organize messages based on specific characteristics including items such as expectations, pre-conceived ideas, experience, attitude, knowledge, biases toward gender, age, ethnicity, etc.

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Effective Presentations Learning Objectives, continued

- Identify and Incorporate Formats to create a smooth flow of information when Informing, Persuading, Recommending, or Motivating.
- Select and Apply various presentation Options including Formal talks to capture attention, explain, and conclude; Extemporaneous talks to make a point quickly; and “Elevator” talks which seize an opportunity and arrange for follow-up; Live vs. Video, Virtual, or Web.
- Using and Creating Visuals. Determine what works – What doesn’t. What to consider when designing and delivering the three types of visuals – Words - Graphs/Charts, and Pictures.
- Using Physical Skills including, Eye contact, Gestures, Posture, Volume, and Pace to reinforce the selected word. When there is a “mismatch” between what is said and how it is said, audiences become distracted and confused.

Participants Will:

- Observe improved performance and effectiveness while preserving individual style.
- Select and apply a variety of skill options and organizational formats based on audience needs and preferences rather than personal habit and convenience.
- Demonstrate use of presentation skills to persuade, inform, and motivate.
- Use physical skills to enhance and support content.
- Possess a wide variety of skills and appropriate options to use to enhance their personal and professional interactions.
- Apply all the skills with comfort and credibility.

Topics:

During the program participants will engage in the following activities which include lecture, demonstration, discussion, video recording and review, and practice with consistent “in the moment” coaching and feedback:

- Planning and developing presentations incorporating a variety of Formats.
- Practicing a new set of presentation skills.
- Observing the presentations of colleagues, and providing feedback.
- Discussing and designing visuals using appropriate techniques.
- Practicing techniques that assure clarity and appropriateness of messages.
- Developing and completing Audience Analysis Checklists
- Handle and control Question – Answer sessions
- Mastering techniques which will assure clarity and appropriateness of messages
- Maintaining their own personal styles

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Technical Writing

Days: 2 CLPs: 16

Course Purpose:

This specialized writing class is for personnel who need to possess effective writing skills in their current roles and in their future careers. The staff needs to produce high-quality written documents and to create correspondence in plain language to focus on the reader's needs. Because the staff is called upon to write for various purposes, they must develop the ability to plan their writing carefully, to achieve the correct tone, and to include relevant and sufficient detail presented in an order that makes sense to the reader. In addition, they must be able to write correctly and to self-edit skillfully. Employees trained in plain writing can write powerful executive summaries and clear reports, memos, instructions, disclosures, notices, forms and descriptions of benefits. These employees not only get better results from their writing, they are also more efficient as they write and find that their writing improves work processes.

Course Objectives:

Participants who successfully complete this course will be able to:

- Gain practical techniques for adding power to written reports, executive summaries and memos.
- Identify the style to fit a particular topic, purpose and audience; analyze and choose solutions for developing the results.
- Improve the reader's understanding of their reports, executive summaries and memos
- Increase compliance with written instructions
- Demonstrate a commitment to clarity
- Improve efficiency in the workplace

In preparation for the training, the students will be asked to send or bring samples of their own work or documents they use regularly.

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Communication Skills

Days: 1 CLPs: 8

Course Purpose:

Communication is the transfer of information from one person to another, so that both parties understand each other. The goal is to provide each other with information that enables them to effectively perform their jobs. As both a sender and receiver of information, people communicate critical information, while making fundamental mistakes within each role. This workshop is designed to help participants more effectively and efficiently relay their messages to others and receive messages from others.

Learning Objectives

Participants who successfully complete this course will be able to:

- Accept personal responsibility for clarifying assumptions made during conversations
- Create clear communication as both the sender and receiver of a message
- Understand the typical blocks to effective communication
- Make communications supportive, rather than defensive
- Actively listen to a sender's message, to more fully understand its meaning
- Speak in a way that encourages others to actively listen
- Use effective communication skills that display and enhance mutual trust and respect

Course Outline

The Communication Process & Styles

- Overview of the process used to transfer information between two or more people
- Understanding your and other's communication styles
- Understanding the strengths and weaknesses of each, individual style
- How to communicate with each style
- How to increase your and others' willingness to adapt to styles different from your own
- Assessing communication climates
- Assessing nonverbal behaviors

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Communication Skills Course Outline, continued

Designing Clear, Concise Messages

- How to make a conscious effort to design clear messages
- How to communicate with others so that they actively seek to understand your message
- Encouraging others to listen with the intent to understand
- Understanding and overcoming communication barriers caused by the sender and by the receiver
- How to effectively deal with typical problems within communications, such as people who jump to conclusions, who hear what they want to hear, who respond emotionally, etc.

Receiving Messages

- How to actively seek to understand others' messages, through active listening
- How to minimize defensive communication and maximize supportive communication
- How to take personal responsibility for clarifying assumptions when communicating

Making Presentations

- Assessing participants' presentation strengths and weaknesses
- Overcoming the fear of public speaking
- How to design a 10-minute presentation

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Leading Teams & Groups

Days: 3 CLPs: 24

Course Purpose:

This workshop will introduce participants to the fundamental principles and tools for understanding how to effectively lead teams and groups. We will focus on the interpersonal leadership and team skills that can help leaders at all levels to create and effective lead teams. This workshop will help equip and empower participants with the experience, knowledge and tools that they can implement to create an engaging team that performs at a high level.

Learning Objectives:

- Use the stages of team or group development to better contribute to team effectiveness
- Use team characteristics and their team member roles to better contribute to team effectiveness
- Understand the role of leadership at different stages of team development
- Assess their leadership style and communication
- Give & receive constructive feedback
- Use active listening with team members
- Resolve interpersonal conflicts
- Be able to identify what to look for in team or group dynamics
- Understand team diversity and how it contributes to conflict, problem solving and innovation
- Be able to differentiate among different “work styles,” creating a greater appreciation for diversity among team members
- Understand the role of emotional intelligence in team dynamics
- Understand the different kinds of trust and how to establish trust on a work team
- Discuss their own and others’ personal & professional values

Target Audience: Current and potential team and group leaders.

Prerequisites: None

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Team Building

Days: 1 CLPs: 8

Course Purpose:

This workshop will introduce participants to essential tools and techniques for understanding how to effectively participate in work teams and to solve team problems. We will focus on the interpersonal team skills that can help supervisors and other team members to more effectively serve and contribute to their teams. This workshop will help equip and empower participants with tools that directly affect a team member's ability to help move the team to higher levels of performance. Hands-on exercises shall be provided throughout the course to increase the student's understanding of the subject matter.

Learning Objectives:

- Use the stages of team or group development to better contribute to team effectiveness
- Use team characteristics and their team member roles to better contribute to team effectiveness
- Give & receive constructive feedback
- Use active listening with team members
- Resolve interpersonal conflicts
- Identify what to look for in team or group dynamics
- Differentiate among different "work styles," creating a greater appreciation for diversity among team members
- See the individual differences in the way we generate ideas for making decisions and solving problems
- Identify the parts of the team and what role is played in helping to make the team successful.
- Deliver and help understand the fundamentals of building a successful team.
- Discuss how to excel and work together.
- Discuss and create team ground rules, goals, and objectives.
- Practice and discuss how best to communicate in teams.
- Discuss techniques of avoiding and overcoming team obstacles.
- Formulate team values.
- Discuss behavioral style differences.
- Discuss long term performance goals.

Target Audience: Current and potential team and group leaders and members.

Prerequisites: None

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Leadership Skills for Non-Supervisors

Days: 2 CLPs: 16

Course Purpose:

Influence is at the heart of most professions. Increasing others' buy-in and commitment to ideas, suggestions, and directives are important to success at work. This workshop is designed to help participants assess how to build relationships with and how to communicate their ideas to others with credibility, confidence, and clarity, increasing their person-to-person influence, rather than position-to-position authority. We will explore why some people are more influential than others and focus on specific how-to skill building. This helps participants with and without formal authority to create mutually beneficial outcomes and apply strategies for facilitating groups for improved productivity.

Learn techniques for improving leadership and influence skills, whether influencing an audience of one or one hundred, by structuring and communicating influence messages so that others will understand them and be more willing to consider them.

Learning Objectives:

- Understand what people expect from formal & informal leaders, in order to be more influential
- Create lasting influence, rather than superficial influence where people just go through the motions
- Identify & assess situational factors that can increase your influence success
- Choose & tailor an influence strategy to meet the specific needs of a target audience
- Develop communication skills to maximize your impact and credibility
- Be a more prepared & self-confident agent of influence
- Understand the role of group dynamics during team meetings
- Accept personal responsibility for clarifying assumptions made during conversations
- Create clear communication as both the sender and receiver of a message
- Understand the typical blocks to effective communication
- Make communications supportive, rather than defensive
- Actively listen to a sender's message, to more fully understand its meaning
- Speak in a way that encourages others to actively listen
- Use effective communication skills that display and enhance mutual trust and respect
- Design a personal plan for a real-world influence attempt

Target Audience: Anyone who must generate commitment in others; new managers or those with management potential, especially when working in an environment characterized by diverse needs and interests.

Prerequisites: None

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Time Management

Days: 1 CLPs: 8

Course Purpose:

This course will provide participants with techniques for managing time and increasing professional effectiveness. They will learn how to spend time on the most important tasks and goals. Participants will learn some tips and tools to help use their time more effectively and efficiently.

Learning Objectives:

- Understand time management principles
- Gain tips and tools to manage time more effectively
- Understand prioritization and delegation
- Identify their work style

Target Audience: All staff members

Prerequisites: None

COURSE CATALOG

Federal Acquisition Certification Courses and Electives

Decision Making & Problem Solving

Days: 2 CLPs: 16

Course Purpose:

The ability to creatively solve problems allows people to continuously improve their work processes and eliminate stumbling blocks to their performance and satisfaction at work. This workshop covers a step-by-step problem solving and decision-making process, from defining the problem to creatively identifying necessary solutions. These techniques typically fit well into organizations' existing problem solving philosophies or may help individuals define their own approach. The tools covered in this workshop can help both teams and individuals to overcome barriers to creativity, visualize a process, pinpoint problems, find their causes, and determine the necessary solutions.

Learning Objectives

- Map a work process, in order to uncover inappropriate, inefficient, or redundant steps
- Generate more creative ideas
- Prioritize options
- Make decisions by employing a thinking process that easily combines and thoroughly examines emotions, information, logic, hope, and creativity
- Create and then focus a team on a specific, shared problem definition
- Identify and organize the root causes of your problems
- Use data to determine the frequency and impact of your problem's root causes
- Identify creative problem solutions and action plans
- Strategically plan for how you will roll out your solution, planning for both helping and hindering forces
- Understand how leveraging differences in the way people think can foster greater innovation
- Enhance collaboration with others by understanding the impact and value of the entire range of innovation styles, through the Innovation Style Inventory
- Leverage the power of two people joining forces to collaborate, through innovation teams-ThinkerTeams
- Employ a variety of specific, hands-on techniques, designed to change your perspective and subsequently generate new ideas, solution sets, and unique insights on purpose

Target Audience: Individuals and intact teams looking for a straightforward process for systematically tackling everyday problems, as well as long-term problems, through a comprehensive decision-making strategy. Individuals and intact teams who need, want, and/or are expected to develop skills that can help them to more fully tap into their innovative talents, to create new ideas and stimulate collaborative thinking between individuals.

Prerequisites: None

COURSE CATALOG

Federal Retirement Planning and Financial Literacy Courses

Part 4: Federal Retirement Planning and Financial Literacy Courses

AMCI's Federal Retirement Planning and Financial Literacy courses extensively cover all aspects of Federal retirement and benefits planning and a variety of retirement seminars on topics essential to retirement planning. Our seminars are tailored to Federal employees and they thoroughly cover all aspects of the Civil Service Retirement System (CSRS) and the Federal Employee Retirement System (FERS), Thrift Savings Plan, and Social Security, as well as financial planning topics that are pertinent to Federal retirement and other employee benefits. All of our lessons are flexible and modular, allowing us to tailor our seminar to meet the specific needs of any and all Federal audiences. These courses are available on a 1-, 2-, and 3- day formats.

COURSE CATALOG

Federal Retirement Planning and Financial Literacy Courses

Retirement Planning Seminar for CSRS or FERS, or CSRS & FERS Combined

Course Description:

Retiring from a Federal career is a confusing time and can be a daunting task. Retirement in general is a significant transition for anyone. The Retirement Planning Seminar for CSRS, FERS or combined, is designed for employees nearing retirement (within 5 years) and informs attendees about the complex array of benefits they have earned, the choices they need to make as they retire, and how to best leverage them within the context of their overall financial and retirement plan.

Course Objectives:

After attending this seminar, attendees will understand the basic financial planning concepts pertinent to retirement as a Federal employee. They will understand the overall Federal retirement process and know when they become eligible to retire, which provisions of retirement law affect the computation of their retirement benefits, how much those benefits are likely to be (CSRS or FERS, Social Security, and TSP), what choices they will need to make regarding survivor benefits, their health (FEHB) and life insurance (FEGLI) coverages, and their TSP funds.

Course Overview:

This Retirement seminar, for either CSRS/CSRS Offset or FERS employees, begins by establishing the basic financial planning concepts necessary for a successful retirement, and reinforces these concepts in succeeding lessons on history and financing of the Federal retirement programs, eligibility requirements, and benefit computations. It also thoroughly covers survivor benefits, social security, and the Thrift Savings Plan, and well as all of the Federal employee insurance programs. Woven among and supporting these lessons are applicable modules on financial and retirement planning, investing and related topics. The seminar is also designed to effectively convey key points and answer questions on a wide range of topics that cover basic retirement eligibility and benefits, and touch on the emotional and psychological aspects of retirement. The seminar will focus on Federal retirement benefits and the impact of financial decisions on those benefits after retirement.

COURSE CATALOG

Federal Retirement Planning and Financial Literacy Courses

Mid-Career Retirement Planning Seminar for FERS Employees

Course Description:

The Mid-Career Retirement Planning Seminar (for Federal employees with 10-15 years of service) takes a decidedly financial planning approach to inform attendees about the complex array of benefits available to them as Federal employees and the choices they need to make to best leverage them within the context of their overall financial and retirement plan. Special attention is paid to developing good financial and retirement goals and using sound investment strategies for best leverage their TSP.

Course Objectives:

After attending this seminar, attendees will know how set retirement savings goals, when they are eligible to retire, which provisions of retirement law affect the computation of their retirement benefits, and how much those benefits are likely to be (FERS, Social Security, and TSP). They will have a sense of the choices they will need to make regarding survivor benefits, their health (FEHB) and life insurance (FEGLI) coverages, and their TSP funds. Finally, they will understand how their Federal employee benefits fit within the overall construct of a financial plan.

Course Overview:

The mid-career seminar for FERS employees is a fast-moving information loaded session that opens with lessons on investment and retirement planning, and the TSP. It moves from there to the history of the Federal retirement programs, what constitutes credible service for retirement purposes, eligibility for retirement, and the computation of FERS annuities and survivor benefits. It thoroughly covers Social Security, Estate Planning and concludes with an important lesson on how the best leverage Federal benefits going forward. The seminar will focus on Federal retirement benefits and how they can be affected by the financial decisions attendees are making now and in the future.

COURSE CATALOG

Federal Retirement Planning and Financial Literacy Courses

Early-Career (Getting Started) Seminar for New Employees

Course Objectives:

Federal benefits are complicated. This Early-Career Seminar for New Employees informs attendees about the complex array of benefits available to them as Federal employees and the choices they need to make to best leverage them within the context of their overall financial and retirement plan.

Course Objectives:

After attending this seminar, attendees will understand when they eligible to retire, what their retirement benefits are likely to be (FERS, Social Security, and TSP), the importance of the TSP toward their retirement and be equipped with sound investment strategies for best leveraging what TSP has to offer. They will understand the choices they will need to make regarding survivor benefits, their health (FEHB) and life insurance (FEGLI) coverages, and their TSP funds, and how their Federal employee benefits fit within the overall construct of a financial plan.

Course Overview:

This seminar for new and returning employees, includes lessons addressing the Federal retirement and benefits programs and how these benefits fit within the overall frame work of a personal financial plan. The seminar will specifically focus on Federal retirement benefits and how they can be affected by the financial decisions attendees are making now and in the future.

COURSE CATALOG

Federal Retirement Planning and Financial Literacy Courses

Separating or Early-Out Federal Employees

Course Objectives:

Working careers have changed in America in that many people no longer pursue a single career working in the same business or for a single employer. Many people now have a work life comprised of several careers in a range of businesses, working for numerous employers, of which Federal service will be a portion. Understanding Federal benefits in this new environment and the implications of leaving Federal service before their normal retirement age are now issues many workers must address. This seminar for Separating or Early-Out Employees explores the decisions employees need to make as they consider leaving Federal service, or accepting early retirement offers, or experiencing discontinued service retirement.

Course Objectives:

After attending this seminar, attendees will understand the basic vesting and eligibility rules for FERS retirement benefits and the TSP, the implications of taking a refund of FERS contributions, moving their TSP funds to an outside retirement plan, and accepting an offer for early retirement or retiring under the discontinued service provisions of FERS.

Course Overview:

This seminar for Separating or Early-Out Employees includes lessons addressing the Federal retirement and benefits programs and how these benefits fit within the overall frame work of a personal financial plan. The seminar will specifically focus on Federal retirement benefits and how they can be affected by the financial decisions attendees are making now and in the future.

COURSE CATALOG

Federal Retirement Planning and Financial Literacy Courses

The Thrift Savings Plan

Course Description:

The Thrift Savings Plan (TSP) is probably the most critical component of Federal retirement benefits today. This seminar provides employees with an in-depth understanding of the TSP as a retirement savings plan and its relationship to the other Federal retirement benefits to which employees have access.

Course Objectives:

After attending this seminar, attendees will understand the importance of the TSP toward their retirement and be equipped with sound investment strategies for best leveraging what TSP has to offer. Finally, they will understand how their Federal employee benefits fit within the overall construct of a financial plan.

Course Overview:

The Thrift Savings Plan Seminar involves a deep-dive into the five primary TSP funds, the Life-Cycle funds, and investment strategies that support building the TSP to the level necessary for a financially sound retirement.

COURSE CATALOG

Federal Retirement Planning and Financial Literacy Courses

Financial Planning

Course Description:

Financial Planning is a daunting task for most people. For Federal employees, financial planning is made more challenging by the complexity of their employee benefits. The Financial Planning for Federal Employees (or Federal Financial Literacy) seminar provides employees with a basic understanding on the principles of financial and retirement planning within the context of the OPM led Federal Financial Literacy Initiative.

Course Objectives:

After attending this seminar, attendees will understand the need for financial planning and how to create a financial plan. They will learn financial principles such as budgeting, saving and investing, credit and debt management, and estate and tax planning. They will understand the importance of the TSP toward their retirement and be equipped with sound investment strategies for best leveraging what TSP has to offer. Finally, they will understand how their Federal employee benefits fit within the overall construct of a financial plan.