

Treasury Acquisition Institute



**Fiscal Year 2015
Training Schedule**



Dear Federal Acquisition Professional:

The TAI is pleased to announce the arrival of the fiscal year 2015 acquisition professional training schedule. As a premier federal acquisition schoolhouse, we continue to listen to the needs of federal acquisition professionals to deliver high quality training solutions. This year we have added the following to our schedule:

Contract Negotiations: The Art and Science of the Deal
How to Avoid Bid Protests
Intellectual Property
Source Selection - with Professor Ralph C. Nash!
Strategic Business Advisor
Strategic Sourcing
Task and Delivery Order Contracting
The Antideficiency Act
The Trifecta: Price Analysis, Cost Analysis and Contract Negotiations
Types of Contracts

The FY 2015 schedule is designed to meet the needs of the changing federal acquisition environment, to provide mandatory training for required certification standards, to address the competencies needed for success, and ultimately, to develop world-class acquisition professionals.

One thing that remains unchanged is our commitment to excellence in our customer service and support. We look forward to seeing you at TAI this year and continuing to provide the training you need to achieve your professional success.

Sincerely,

The TAI Staff



TAI Staff Directory

Kelvin R. Wood

Chief Learning Officer

(240) 613-8409

kelvin.r.wood@irs.gov

Jodi Stark

Procurement Analyst/Program Manager

(240) 613-8349

jodi.i.stark@irs.gov

Tom Riddle

Procurement Analyst

(240) 613-832

tom.l.riddle@irs.gov

Shonda Grier

Business Operations Specialist

(240) 613-8147

shonda.n.grier@irs.gov

Donald Guy

Business Operations Specialist

(240) 613-8153

donald.i.guy@irs.gov

Rhonda Stewart

Procurement Analyst

(240) 613-8353

rhonda.l.stewart@irs.gov

Rewa Houston

Management Analyst

(240) 613-8179

rewa.t.houston@irs.gov

Jerome Ellis

Business Operations Specialist

(240) 613-8113

jerome.t.ellis@irs.gov

Valinda Pittman

Management Analyst

(240) 613-8298

valinda.l.pittman@irs.gov

PROGRAM OVERVIEW, POLICES & GENERAL INFORMATION

For additional program and registration information, please visit the TAI website:

TAI Intranet: <http://awss.web.irs.gov/Procurement/tai/index.shtml>

TAI Internet: <http://www.irs.gov/uac/Treasury-Acquisition-Institute>

Treasury Acquisition Institute's History

The Department of the Treasury and the Internal Revenue Service in partnership with the other Treasury Bureaus on September 14, 1993 established the Treasury Acquisition Institute (TAI). TAI was created to coordinate and lead Departmental and Bureau efforts to obtain the best training possible for their acquisition professionals. Since commencement, many other Federal agencies and organizations have participated in the TAI training program.

Taking Classes at TAI

TAI serves many government agencies and bureaus such as the Environmental Protection Agency, Customs and Border Protection, the Bureau of Engraving and Printing, and the Department of Health and Human services to name a few. If your agency/bureau is interested in attending a TAI course, please contact Rhonda Stewart at (240)613-8353 or via email at Rhonda.L.Stewart@irs.gov for information about establishing an Interagency Agreement with TAI.

Course Location and Hours

The Treasury Acquisition Institute, located at 6009 Oxon Hill Road in Oxon Hill, Maryland, is the training location for all TAI courses held through October 2015. This location is very easy to find and includes free parking (see Hotel Accommodations, Transportation and Parking on page 7.)

Classes begin at 8:30 am and end at 4:30 pm unless otherwise noted on the registration confirmation.

IRS Procurement Employees

TAI is your preferred training provider. You should apply for classes held at TAI before considering other training providers. If the dates offered by TAI are not conducive to your work schedule, then you can consider other training providers.

How to Register for TAI Classes

To register for courses, you must create a profile and submit a request through the Federal Acquisition Institute's Training Application System (FAITAS) - <https://www.atrrs.army.mil/faitas>.

Need Help with FAITAS?

A **FAITAS Employee Quick Start Guide** is located under the Help Menu from the FAITAS login page. Additional guides are located under the Help Menu once logged into FAITAS.

Instructions for creating a profile, submitting a training request for TAI, FAI or DAU sponsored training and printing training certificates in the Federal Acquisitions Institute Training Application System (FAITAS) are located on the TAI website:

TAI Intranet: <http://awss.web.irs.gov/Procurement/tai/index.shtml>

TAI Internet: <http://www.irs.gov/uac/Treasury-Acquisition-Institute>

Frequently Asked Questions for FAITAS are located at <https://www.atrrs.army.mil/faitas/External/FAQ>.

What Happens After You Submit Your Request?

Your training request will be submitted via email to the supervisor selected in your profile. (Note: Your supervisor must create a profile in FAITAS for you to select them.)

Your supervisor must go into FAITAS and approve your request before it is submitted to the Treasury Acquisition Institute (TAI) Registrar for approval.

After your supervisor and the TAI Registrar approve your request in FAITAS, you will receive an email confirmation. If you do not receive an email that confirms your registration and/or you need any assistance regarding FAITAS, you **must** contact the FAI Help Desk at (703) 752-9604 or submit a help desk ticket at <http://www.fai.gov/drupal/content/help-desk>.

IMPORTANT: Your seat in the class is NOT confirmed until you receive an email from training@fai.gov with the subject "Training Request Approved by Federal Acquisition Institute" and the status shows "Reserved" in FAITAS.

TAI Registrar Information

For inquiries about TAI classes, you may send an email to awss.tai.registrar@irs.gov.

Attendance Policy

You are required to attend all scheduled days of your course. If you have to be absent from any portion of the course, you must notify your supervisor, instructor and a Treasury Acquisition Institute (TAI) staff member. Significant absences from the classroom will be reported to TAI and to your supervisor, which may result in your not receiving credit for the course. Cumulative absences of instructional time may be grounds for failing the class. If you are absent for more than 5% of the scheduled class time, you will be required to retake the entire course.

Wait List Policy

Because of the limited quantity of training, we expect courses to fill quickly. If your desired course is full, we will place you on the wait list and notify you if space becomes available. When you are notified that you have been placed on a course wait list, you could be enrolled in the course when one of the following occurs:

- a colleague in your agency cancels from the course, substitution is requested by their supervisor and the Registrar approves your enrollment; or
- a student cancellation creates a vacancy and you are the next person on the wait list.

To find out if your waitlist position has changed please log into your FAITAS account. You are responsible for making your own travel arrangements; however, you should **not** make travel arrangements until you receive an email confirming your registration reservation.

It is highly recommended that you bring your class confirmation email with you on the first day of your class. Instructors will only admit you if you have a confirmed reservation on their class roster. If you arrive for class and are not on the roster with a confirmed reservation or a wait list number you must leave the class immediately. If you are not on the instructor's roster and believe you have a confirmed reservation, you must see a member of the TAI staff immediately.

Only individuals on the wait list can fill open seats. No walk-ins are permitted to stay for the class. If there are open seats after 9:00 a.m., your number on the wait list will be used to determine placement.

No Show Policy and Class Cancellation

A “No Show” will result when you fail to report to class on the first day (at the class start time) and we did not receive and process a cancellation for you in FAITAS prior to the class start date. In the event of a No-Show, you will be prevented from registering for **any** TAI course for a period of 3 months.

All cancellation requests **must** be processed through FAITAS. If you are unable to attend a class for which you are registered, you must cancel your registration in FAITAS no less than **two weeks** before the class start date (**four weeks** for classes with pre-course work). Canceling your registration later than these timeframes, may result in a penalty preventing you from registering for the same course for a period of up to 3 months. Please allow up to 2 days for cancellations to be processed in FAITAS.

Dress Policy

The dress policy at TAI is casual business attire. Shorts, caps, tank tops, athletic sweat suits and flip-flops are inappropriate. For your comfort, we highly recommend you bring a jacket or sweater.

Reasonable Accommodations

It is the responsibility of the employee’s manager to arrange for reasonable accommodations (i.e., interpreter for hearing impaired) and to notify the TAI Registrars (Rewa Houston at Rewa.T.Houston@irs.gov and Donald Guy at Donald.I.Guy@irs.gov) **no less than three weeks in advance of the class start date** to ensure the vendor is notified.

Weather Related Issues

TAI’s operating status is the same as the operating status for Federal Employees in the Washington, DC Area. To check operating status in the Washington, DC Area go to the OPM website: <http://www.opm.gov/policy-data-oversight/snow-dismissal-procedures>. If the Federal Government is closed, TAI will be closed.

When weather-related absences affect significant segments of the course, the instructor will determine if the course will be rescheduled. If a student does not complete the prescribed make-up, no credit will be issued for any part of the course. Many courses offered at TAI are only offered once. If weather conditions prevent you from attending when the Federal government is still operating and the class is still being conducted, you will be responsible for finding alternate training options.

Hotel Accommodations, Transportation and Parking

You are responsible for making your own travel arrangements; however, you must **not** make travel arrangements until you receive an email confirming your registration reservation.

Hotel Accommodations: The Treasury Acquisition Institute ¹Oxon Hill location is located in close proximity to the National Harbor, Crystal City and Alexandria, VA. Please visit <http://www.hotels.com> for hotel accommodations in these areas.

Transportation Options:

1. **Metro Rail Service:** The nearest metro rail station is Suitland Metro Station, Green Line.
2. **Metro Bus Service:** The metro bus stops in front of the Constellation Centre Building. Information on the metro rail and metro bus systems are available at <http://www.wmata.com>.
3. **Taxi Cab Service:** The following taxicab services serve the Washington Metropolitan Area:
 - Yellow Cab Company of D.C., Inc.
Phone (202) 544-1212
 - Maryland Taxi Service
Phone: (301) 277-6000 or (301) 864-7700

Parking: Free Parking is available in the front of the building.

¹ Beginning in April 2015, classes will be held at TAI's new location, 77K Street, N.E., Washington, DC 20002, Second Floor. This location is conveniently located within walking distance of [Union Station](#) via the Metrorail Red Line.

Smoking Policy

Smokers must use the space provided outside in the rear courtyard, not in the front of the building.

FY 2015 COURSE OFFERINGS

1102 Series Mandatory Contracting (FAC-C)

CON 170: Fundamentals of Cost and Price Analysis
FCN 190: FAR Fundamentals
CON 270: Intermediate Cost and Price Analysis
CON 280: Source Selection and Administration of Service Contracts
CON 290: Contract Administration and Negotiation Techniques in a Supply Environment
CON 360: Contracting for Decision Makers

Contracting Officer's Representatives (FAC-COR)

FAC-COR Level II Training - Contracting for CORs

Acquisition Continuous Learning

A Practical Guide to the FAR
Annual FAR Update
Annual Review - Hot Issues in Federal Contracting
Contract Closeout
Contract Negotiations: The Art and Science of the Deal - **New!**
Contract Terminations and Disputes
Contracting with Small Business Concerns
Cost and Price Realism
Critical Thinking and Problem Solving for Contracting Professionals
Evaluating a Contractor's Performance
Federal Appropriations Law
Government Contract Law (for Oakland Area Office)
How to Avoid Bid Protests - **New!**
Information Technology Acquisition
Intellectual Property - **New!**
Performance-Based Contract Administration
Requirements Writing Workshop: SOO, PWS and SOW
Service Contract Labor Standards Statute Overview
Source Selection - **New with Professor Ralph C. Nash!**
Strategic Business Advisor - **New!**
Strategic Sourcing - **New!**
Task and Delivery Order Contracting - **New!**
The Antideficiency Act - **New!**
The Trifecta: Price Analysis, Cost Analysis and Contract Negotiations - **New!**
Types of Contracts - **New!**

FY 2015 Training Schedule

START DATE	END DATE	COURSE TITLE	CLPs	FAITAS COURSE #	FAITAS CLASS #	VENDOR
11/04/14	11/06/14	The Trifecta: Price Analysis, Cost Analysis and Contract Negotiations	24	FCN TRI	101	Public Contracting Institute
11/12/14	11/13/14	Contract Terminations and Disputes	16	FCN CDAT	101	Tomanelli
11/12/14	11/13/14	Strategic Sourcing	16	FQN STRS	101	ASI
11/17/14	11/21/14	FAC-COR Level II Training - Contracting for CORs	40	COR CON	101	Houseman
12/01/14	12/12/14	CON 170: Fundamentals of Cost and Price Analysis	80	CON 170 (FED)	101	MCI
CANCELLED	CANCELLED	CON 270: Intermediate Cost and Price Analysis	80	CON 270 (FED)	101	MCI
01/06/15	01/08/15	Government Contract Law (for Oakland Area Office)	24	FCN GCL	101	Tomanelli
01/06/15	01/07/15	Service Contract Labor Standards Statute Overview	16	FQN SCLSSO	101	MCI
01/12/15	01/16/15	FAC-COR Level II Training - Contracting for CORs	40	COR CON	102	Houseman
01/14/15	01/14/15	Annual FAR Update	8	FQN FAR	101	Tomanelli
01/20/15	01/22/15	Information Technology Acquisition	24	FQN ITA	101	MCI
01/21/15	01/22/15	Contract Closeout	16	CON CLS	101	MCI

FY 2015 Training Schedule (continued)

START DATE	END DATE	COURSE TITLE	CLPs	FAITAS COURSE #	FAITAS CLASS #	VENDOR
CANCELLED	CANCELLED	CON 280: Source Selection and Administration of Service Contracts	80	CON 280 (FED)	101	AMCI
01/27/15	01/29/15	Critical Thinking and Problem Solving for Contracting Professionals	24	FCN CTPSCP	101	ESI
01/27/15	01/28/15	Strategic Business Advisor	16	FQN SBA	101	ASI
02/03/15	02/04/15	Requirements Writing Workshop: SOO, PWS and SOW	16	FQN RWW	101	ASI
02/10/15	02/11/15	Contract Negotiations: The Art and Science of the Deal	16	FCN ASD	101	ASI
02/10/15	02/12/15	The Trifecta: Price Analysis, Cost Analysis and Contract Negotiations	24	FCN TRI	102	Public Contracting Institute
02/12/15	02/12/15	How to Avoid Bid Protests	8	FCN ABP	101	Tomanelli
02/17/15	02/19/15	Evaluating a Contractor's Performance	24	FCN ECP	101	MCI
02/18/15	02/18/15	Annual FAR Update	8	FQN FAR	102	Tomanelli
02/18/15	02/19/15	The Antideficiency Act	16	FQN ADA	101	Tomanelli
CANCELLED	CANCELLED	CON 290: Contract Administration and Negotiation Techniques in a Supply Environment	80	CON 290 (FED)	101	AMCI
02/23/15	02/27/15	FAC-COR Level II Training - Contracting for CORs	40	COR CON	103	Houseman
02/24/15	02/26/15	Federal Appropriations Law	24	FQN LAW	101	Tomanelli

FY 2015 Training Schedule (continued)

START DATE	END DATE	COURSE TITLE	CLPs	FAITAS COURSE #	FAITAS CLASS #	VENDOR
03/02/15	03/04/15	Performance-Based Contract Administration	24	FQN PBCA	101	Tomanelli
03/04/15	03/05/15	Source Selection	16	FQN SS	101	Federal Publications Seminars
03/05/15	03/05/15	Annual Review - Hot Issues in Federal Contracting	8	FCN ARHIFC	101	Centre Consulting
03/10/15	03/11/15	Contracting with Small Business Concerns	16	FCN CSB	101	Tomanelli
03/11/15	03/11/15	Annual Review - Hot Issues in Federal Contracting	8	FCN ARHIFC	102	Centre Consulting
03/12/15	03/12/15	Types of Contracts	8	FCN TOC	101	Public Contracting Institute
03/16/15	03/27/15	CON 360: Contracting for Decision Makers	80	CON 360 (FED)	101	AMCI
03/17/15	03/18/15	Cost and Price Realism	16	FQN CPR	101	Centre Consulting
03/19/15	03/19/15	Intellectual Property	8	FCN IP	101	Tomanelli
03/23/15	03/27/15	FAC-COR Level II Training - Contracting for CORs	40	COR CON	104	Houseman
03/24/15	03/25/15	Task and Delivery Order Contracting	16	FCN TDOC	101	MCI
03/26/15	03/26/15	Annual Review - Hot Issues in Federal Contracting	8	FCN ARHIFC	103	Centre Consulting
04/14/15	04/16/15	Critical Thinking and Problem Solving for Contracting Professionals	24	FCN CTPSCP	102	ESI
04/21/15	04/22/15	Contract Closeout	16	CON CLS	102	MCI

FY 2015 Training Schedule (continued)

START DATE	END DATE	COURSE TITLE	CLPs	FAITAS COURSE #	FAITAS CLASS #	VENDOR
04/23/15	04/23/15	Types of Contracts	8	FCN TOC	102	Public Contracting Institute
05/04/15	05/15/15	FCN 190: FAR Fundamentals	80	FCN 190	101	MCI
05/13/15	05/14/15	The Antideficiency Act	16	FQN ADA	102	Tomanelli
05/05/15	05/06/15	Source Selection	16	FQN SS	102	Federal Publications Seminars
05/19/15	05/21/15	A Practical Guide to the FAR	24	FQN PGF	101	Tomanelli
06/02/15	06/04/15	Information Technology Acquisition	24	FQN ITA	102	MCI
06/02/15	06/02/15	How to Avoid Bid Protests	8	FCN ABP	102	Tomanelli
06/09/15	06/10/15	Task and Delivery Order Contracting	16	FCN TDOC	102	MCI
06/16/15	06/18/15	Critical Thinking and Problem Solving for Contracting Professionals	24	FCN CTPSCP	103	ESI
06/23/15	06/24/15	Contract Closeout	16	CON CLS	101	MCI
06/30/15	07/01/15	Source Selection	16	FQN SS	103	Federal Publications Seminars
07/07/15	07/08/15	Service Contract Labor Standards Statute Overview	16	FQN SCLSSO	102	MCI
07/09/15	07/09/15	How to Avoid Bid Protests	8	FCN ABP	103	Tomanelli
07/14/15	07/15/15	The Antideficiency Act	16	FQN ADA	103	Tomanelli

FY 2015 COURSE DESCRIPTIONS

1102 Series Mandatory Contracting (FAC-C)

CON 170: Fundamentals of Cost and Price Analysis

This training course is designed for personnel who are seeking FAC-C Level I training and require this course for certification. Students will learn foundational knowledge of cost and price analysis and apply quantitative tools to accomplish cost and price analysis in accordance with the FAR. 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.

Prerequisites: CON 127, FAC 023, FAC 031, CLC 057, CLC 058

FCN 190: FAR Fundamentals

This training course is designed for personnel new to federal contracting workforce who are seeking FAC-C Level I training and require this course for certification. This training course provides foundational knowledge of the Federal Acquisition Regulation (FAR) System. Students will be immersed in the FAR throughout this course and emerge knowledgeable of the government contracting process; the FAR and FAR supplement structure; FAR Parts 1–53; and will be able to locate and understand FAR regulations, guidance, provisions, and clauses. Students will navigate the online FAR as they wrestle with realistic scenario-based contracting problems.

Prerequisites: CON 170

CON 270: Intermediate Cost and Price Analysis

This training course is designed for personnel who are seeking FAC-C Level II training and require this course for certification. Intermediate Cost and Price Analysis continues to build upon the fundamental contract pricing principles covered in the Level I Contracting curriculum. 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, 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 FAC-C 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.

Prerequisites: CON 216, CLC 056

CON 280: Source Selection and Administration of Service Contracts

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.

Prerequisites: CON270, CLC051, HBS428

CON 290: Contract Administration and Negotiation Techniques in a Supply Environment

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 closeout. 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.

Prerequisites: CON270, CLC051, HBS428

CON 360: Contracting for Decision Makers

This advanced course gives you practice in applying the skills and knowledge gained in previous courses and work experience to realistic learning scenarios. You will work individually and in teams to develop and present innovative approaches and sound business solutions to challenging issues concerning risk, planning, and performance. You will confront an interrelated array of issues that require you to use judgment and comprehensive knowledge to resolve. You will hone problem-solving and critical-thinking skills that will help you develop real solutions to real acquisition problems. The result will be more effective managerial business decisions that support the agency's mission. You must complete a pre-classroom assignment prior to attending the course that will form part of your overall grade. The vendor will provide this assignment 30 days prior to the start of the class.

Prerequisites: CON 280 & CON 290

Contracting Officer's Representatives (FAC-COR)

FAC-COR Level II Training - Contracting for CORs

This course fulfills the requirements for FAC-COR Level II certification and 40 hours toward FAC-COR Level III certification. It covers the Project Officer/COR's responsibilities for guiding acquisitions from initial planning efforts and requirement determination through source selection, contract management, and final payment. It discusses applicable principles, policies, and procedures to achieve the agency's mission through contracting.

Learning Objectives:

At the conclusion of this training, you will be able to:

- Identify your responsibilities in the acquisition process from procurement planning through contract management
- Recognize application of statutory law, federal regulation, and the common law of federal contracts to their acquisitions
- Prepare an acquisition plan including an acquisition strategy, an acquisition team with defined roles and responsibilities, a practical time line, market research techniques, source selection procedure budgeting and funding considerations, outsourcing considerations, logistics, security concerns, environmental requirements, and government-furnished information and property
- Prepare key elements of a performance-based work statement, source selection criteria, and technical proposal instructions
- Recognize the requirements for (i) full and open competition, (ii) use of required sources, and (iii) small business set-aside goals and programs
- Observe solicitation constraints including communication with prospective offerors, disclosure of information, and confidentiality
- Understand your input to the source selection process including the technical evaluation plan, evaluating proposals and reaching an agreement, 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
- Avoid constructive changes
- Review payment requests under fixed price and cost reimbursement contracts and provide timely feedback
- Know and appreciate standards of procurement ethics including areas of proscribed conduct under the Procurement Integrity Act and criminal conflict of interest statutes

Acquisition Continuous Learning

FQN PGF - A Practical Guide to the FAR

This course is designed to address challenges with the FAR in a highly practical and user-friendly way. The instructor and the students will work through various practical exercises specifically designed to demonstrate how the FAR can be effectively used. Students will develop and refine the skills necessary to apply the FAR to virtually any acquisition situation.

FQN FAR - Annual FAR Update

This one-day session summarizes recent changes to the Federal Acquisition Regulation (FAR). Course material is continually updated and covers FAR changes finalized in the 12-month period preceding each class. This class enables busy acquisition professionals to “catch up” on a year’s worth of changes in a single day.

FCN ARHIFC - Annual Review-Hot Issues in Federal Contracting

One of our most popular events, Annual Review provides everything you need to stay current in the ever-changing field of government contracts. Topics in previous years have included FAR updates, strategic sourcing, cyber security and much more. Use this as a refresher on the developments in contracting over the past year and as an opportunity to network with others. Hear predictions for 2015 and gain a solid understanding of recent events and changes in the contracting world—a great way to start the New Year!

CON CLS - Contract Closeout

Designed for the practitioner, this hands-on training course delves into the issues involved with successfully closing out a contract. It begins with a description of what constitutes a contract file and ends with its disposal. In the course, you will discuss organizational structures and players required for closeout, execute the steps required to close out different types of contracts, and handle items of special concern.

Topics include:

- Contract closeout procedures - contract completion statement, physical completion, time standards for closing contract files, organizational structure, and personnel involved
- Purpose of contract documentation, types of contract files, and contents of contract files
- Basic closeout principles - closeout steps, accelerated closeout, and areas of special concern
- Effects of contract termination on closeout procedures - termination for convenience, termination based on inadequate contractor performance, and no-cost settlement
- Time requirements for record retention
- Problem contract closeouts - contractor no longer in business, contractor in bankruptcy, contractor unable to submit supporting indirect cost data for submission of final vouchers, contractor fails to submit final invoice or voucher

FCN CDAT - Contract Disputes and Terminations

This class will provide a practical and comprehensive understanding of contract terminations and disputes. We will cover how and when a contract may be terminated for convenience, the contractor's obligation to submit a termination settlement proposal and the techniques available to calculate the settlement amount. We will also cover the grounds for terminating a contract for default, the procedural requirements that must be followed and the rights and liabilities of the parties. Because termination actions often result in contract claims, students will also learn about the contract disputes process, the requirements that a contractor must comply with to submit a proper claim, how to prepare the Contracting Officer's Final Decision and how to ensure compliance with other statutory requirements of the Contract Disputes Act. The use of discussion problems and case studies will provide students with the opportunity to apply the lessons learned to reinforce the most important points.

FCN ASD - Contract Negotiations: The Art and Science of the Deal – New!

While more and more business transactions are conducted via electronic means, including e-marketplaces, e-catalogs, and e-auctions, the majority of the dollars are still spent in relatively few large, complex, negotiated deals: the vital, few; the trivial, many. While all business deals are important, some are clearly more important than others. For both buyers and sellers, ensuring you get the most favorable outcome from each big deal is critical to the success of your organization.

This two-day highly interactive course provides a comprehensive treatment of contract negotiations, including planning, conducting, and documenting the deal. The course provides skill assessment tools, case studies, exercises, and more than 100 proven best practices – strategies and techniques to become a master contract negotiator. The course offers a simple, yet highly effective process approach with forms and tools to guide the planning and executing of a successful negotiation.

Learning Objectives:

- Recognize the strategies, tactics, and counter tactics to achieve success in contract negotiations.
- Apply best practices for contract negotiation planning, contract negotiation documenting, and contract negotiation.
- Utilize the five critical components for creating a successful performance-based acquisition (PBA)

FCN CSB - Contracting with Small Business Concerns

This training course defines and describes federal socioeconomic programs. Students will gain a good understanding of program policies, procedures, and problem areas associated with various socioeconomic programs benefiting small businesses. After successful completion of this training course, the student will be able to describe the different socioeconomic programs required by the Federal Acquisition Regulation (FAR) and determine which program or programs to use in a particular acquisition.

FQN CPR - Cost and Price Realism

This course provides a thorough walk-through of the basics of cost and price realism analysis. The course provides hands-on, interactive learning with exercises, case studies, and group work, to give greater emphasis to the application of the course principles.

Learning Objectives:

- Understand the difference between cost and price analysis
- Identify Government requirements and goals in the contract pricing process
- Explain the legal basis for contract pricing efforts
- Identify the responsibilities of contracting officers and contracting specialists in the contract pricing process
- Learn how to conduct a price realism analysis
- Understand the importance of analyzing staffing in conjunction price
- Learn how to conduct cost realism to avoid protest

Topics include:

- | | | |
|---------------------------------------|-----------------------------------|--|
| • Overview of Price and Cost Analysis | • Justification and Documentation | • Special Issues |
| • FAR Requirements | • Resources | • Uncompensated Overtime |
| • CO Roles and Responsibilities | • Understanding Special Costs | • Low Bids |
| • Price Analysis Tools and Techniques | • Specific Cost Issues-- Workshop | • "Added Value" Subcontractors |
| • Cost elements; bottom line price; | • Labor Rates | • Negotiation positions – Role play workshop |
| • Allocable costs – Workshop | • Overhead and G&A | • Preparing for Business Reviews and Audits |
| • Cost Realism Analysis | • Profit | • Working with DCAA |
| • What is Cost Realism? | | |

FCN CTPSCP - Critical Thinking and Problem Solving for Contracting Professionals

This course addresses the five types of critical thinking needed in acquisition environments: Strategic, tactical, analytical, innovative, and implicative. It also teaches a five-step process for responding to acquisition problems/opportunities: Identify and analyze problems/opportunities, analyze the environment, explore potential responses, select the optimal response, and implement the optimal response. The course includes exercises and case studies, so you can practice using the different thinking approaches to achieve maximum results. You will have the opportunity to apply core concepts to a specific problem or opportunity from their own acquisition environment.

Learning Objectives:

- Explain the importance of critical thinking and problem solving in acquisition competencies matrix
- Identify key decisions to be made in acquisition process
- Leverage current theories on human thought to improve your performance and that of your team members
- Discriminate between the different critical thinking styles and determine when to use each type in the acquisition environment
- Uncover acquisition problems and opportunities and learn how to address them
- Assess the internal and external environmental factors surrounding problems and opportunities
- Explore a wide range of potential responses to an acquisition problem or opportunity
- Evaluate potential responses to a problem or opportunity to determine the best response
- Persuade acquisition stakeholders to support the best response, design an action plan for implementing the best response, and successfully execute the action plan

FCN ECP - Evaluating a Contractor's Performance

All members of the acquisition team will benefit by attending this training course. Coverage includes relationships among the requirements document, risk, contract type, and the need to evaluate contractor performance. In this course, you will learn how to: explain when it is necessary to evaluate a contractor's performance; plan the evaluation; evaluate a contractor's performance; take corrective action; and document the results.

Topics include:

- | | | |
|--|--|---|
| • Planning for Contract Administration | • Monitoring and Evaluating the Contractor's Performance | • Remedies - Contractor-Caused Delays |
| • Initial Steps in Monitoring Contracts | • Contract Types and Contract Payment Structure | • Withholding progress payments |
| • Work Planning, Scheduling, and Monitoring Techniques | • Using Gantt, Milestone, Network, and Swan charts | • Contract Modifications |
| • Earned Value Management System | | • Terminations Due to Inadequate Contractor Performance |
| | | • Performance Evaluation Reporting |

FQN LAW - Federal Appropriations Law

This three-day course covers the fundamental concepts of federal appropriations law. Topics include an overview of the appropriations process, the bona fide needs rule, severable and non-severable contracts, the "Purpose" statute and the Antideficiency Act. Class discussion will be augmented with practical exercises to reinforce these key fiscal concepts.

FCN ABP - How to Avoid Bid Protests – New!

This class will discuss proven techniques and strategies to reduce the probability of receiving a bid protest by taking certain actions during acquisition planning, interactions with vendors, during the conduct of the procurement and after contract award. We will also cover techniques to maximize the Government's chances of winning a protest in those cases when a protest cannot be avoided.

FQN ITA - Information Technology Acquisition

This training course focuses on areas and considerations unique to the acquisition of information technology (IT). It is designed for program and contracting personnel who are involved in the acquisition of IT supplies and services. In this course, you will learn how to explain the basis for IT acquisition; conduct mission and business planning, as well as acquisition planning; review established sources and determine which can satisfy the agency need; determine compliance with accessibility requirement; and resolve intellectual property issues.

Topics include:

- Basis for IT Acquisitions
- Planning for IT Acquisitions
- Security, Accessibility, and Other IT Planning Considerations
- Developing Requirements Documents and Evaluation Factors
- Satisfying the IT Need
- Contract Administration

FCN IP - Intellectual Property – New!

In this one-day class, students will gain an understanding of the various types of intellectual property rights that are applicable to Government contracts and how to ensure that the Government receives the level of intellectual property rights necessary to perform its mission. We will cover how patent rights are allocated between the Government and the contractor, the use of third party patents, the applicability of copyright and trademark rights under Government contracts and the various levels of data rights established by the FAR data rights clauses. Several practical exercises will be used to reinforce the key points.

FQN PBCA - Performance-Based Contract Administration

Over the years, performance-based contract training tended to focus on the pre-award activities of writing the Performance Work Statement and developing standards and metrics, but there generally was very little coverage of what happens after award of a performance-based contract and how such contracts should be administered. In this class, students will learn how to administer a performance based contract. Students will learn how to develop and apply a Quality Assurance Surveillance Plan and Award Fee and Award Term plans. We will also cover contract changes, inspections and testing, the role of the COR, past performance evaluations and closeout of performance based contracts. Multiple real-life examples and practical exercises will be used throughout the class.

FQN RWW - Requirements Writing Workshop: SOO, PWS and SOW

A requirements document conveys the work to be performed under the contract to the contractor. The requirements document can be in the form of a performance-based Statement of Objectives (SOO), a performance-based Performance Work Statement (PWS) or a prescriptive Statement of Work (SOW). While it is often assumed that the program office can define its requirements, too often that is not the case. Contracting professionals need to understand how to draw out those requirements from program personnel and how to use those requirements as the basis for a new competitive solicitation.

Over the past decade, federal acquisitions have been moving more towards using either a SOO or PWS where the desired objectives, goals or results are stated, the contractor's performance is measured under a Quality Assurance Surveillance Plan (QASP), and the detailed means and methods of doing the work is left up to the contractor. For Performance-Based Acquisition (PBA), the government is interested in leveraging industry best practices, creativity and tailored solutions. Agency requirements are communicated to contractors using instruments like the SOO and the PWS. However, there are situations where not allowing the contractor the latitude of determining how to do the work and providing the prescriptive details of how the work will be accomplished is necessary.

Learning Objectives:

- Differentiate between the types of requirements documents
- Recognize the critical nature of the requirements document
- Define PBA and recognize its importance to development of requirements, to include the QASP
- Develop the different parts of a SOW
- Develop the different parts of the PWS and QASP
- Develop the different parts of a SOO and QASP

FQN FCL SSO - Service Contract Labor Standards Statute Overview – New! ***(formerly Service Contract Act Overview)***

This training course is designed to help federal personnel administer the requirements of the McNamara-O'Hara Service Contract Act of 1965 (SCA). The course focuses on the Act, the Department of Labor (DOL) regulations that implement it, and how it applies to the acquisition process. A detailed, comprehensive text is provided that contains copies of the law, DOL implementing regulations, Administrative Review Board decisions, and wage determinations.

Learning Objectives:

- Determine if the SCA applies
- Understand basic wage and fringe benefit rules
- Apply the SCA provisions to applicable contracts
- Enforce the statute

FQN SS - Source Selection - New with Professor Nash!

This course addresses vital issues on source selection, covering the negotiation process, effective techniques and pitfalls to avoid.

Taught by the legendary Ralph C Nash, Professor Emeritus at The George Washington University, a renowned expert on government contracting, this course will cover the competitive negotiation process, including scoring techniques, negotiation strategies and relevant law and procedures that must be followed. Learn from the thought leader on the process, as Professor Nash cites real-world examples from decades of experience to address your questions on the practice.

Topics Include:

- Acquisition Planning
- Competition requirements and contracting vehicles
- Work statements
- Competitive negotiation strategies
- Prequalification techniques
- Streamlining the process
- Preparing a clear RFP and pre-proposal exchanges
- Selecting evaluation factors and types of factors
- Technical proposal vs. oral presentation and presentation format
- The Source Selection Team and Time for Evaluation
- Award without discussions, permissible communications
- Late proposals, evaluation of proposals, past performance/experience, past Performance Evaluation Tips
- Evaluation of price or cost, prohibition on obtaining cost or pricing data, information other than cost or pricing data
- Price Analysis, Cost Realism Analysis and Price Realism Analysis
- Effective negotiation, competitive range, negotiations/discussions
- Final proposal revisions, document understandings, common cutoff date, Late is Late Rule
- Protest forums, types of forums, protest avoidance

FQN SBA - Strategic Business Advisor – New!

This two-day course focuses on the need for and how contracting professionals can transition from a transaction-based, compliance-oriented role to a highly valued strategic asset for the agencies they serve. It will also provide valuable insight into critical interpersonal skills, working in teams and team dynamics. Students will develop an understanding of and the importance of the strategic business advisor role and responsibilities, learn techniques for the development of business acumen and interpersonal skills, and will be provided with industry insights on how to achieve greater mission results through acquisition. The course includes a combination of lecture, case studies, and class exercises.

Learning Objectives:

- Recognize the significance of contracting to agency missions
- Define and understand the role of the strategic business advisor
- Develop business acumen
- Recognize the value of interpersonal skills
- Recognize the government-industry dynamic
- Identify ways to manage for results

FQN STRS - Strategic Sourcing – New!

In this two-day interactive course, students will gain an understanding of strategic sourcing principles and their application including: an understanding of what strategic sourcing is; what strategic sourcing is not; what industry and government agencies are doing regarding strategic sourcing; and how to apply strategic sourcing principles to transform their organizations and improve acquisition life-cycle results – saving time, reducing costs, and enhancing mission outcomes. This course provides a simple yet highly effective process approach to strategic sourcing assessments, implementation, and results measurement.

Learning Objectives:

- Define Strategic Sourcing terms and key principles
- Apply strategic sourcing principles to an acquisition within your agency or organization
- Develop measures and metrics for organizational assessment
- Apply processes and techniques to assess and identify strategic sourcing opportunities

FCN TDOC - Task and Delivery Order Contracting – New!

This training course addresses the planning, use, and administration of task and delivery orders. Students will learn about the variety of existing contract vehicles available to them, as well as the process of developing new task and delivery order contracts.

Learning Objectives:

- Explain when and how to use task and delivery order contracts and the rules that guide them
- Select an appropriate contract vehicle to fulfill requirements for a specific acquisition
- Use GSA Schedules correctly and innovatively
- Place task and delivery orders using existing non-schedule contract vehicles
- Describe the process to create task-order and delivery order contracts
- Administer task and delivery orders

FQN ADA - The Antideficiency Act – New!

This is an intensive two-day course on compliance with the Antideficiency Acts. It is divided into five parts. It begins with an introduction to the core of fiscal laws that are essential to understanding the Acts, such as the concepts of an obligation, transfers and augmentations. It then moves on to the subjects of purpose and time (to include the disagreement between the Attorney General and Comptroller General on certain purpose violations and the ADA), and how obligations of the wrong purpose and year's appropriations can result in an ADA violation.

Part 4 is a thorough treatment of the Antideficiency Acts, their essential parts from the 1870 law and its 1905 amendments about apportionments and voluntary and personal servicers (about which seminar participants will be thoroughly informed), and the most instructive ADA violations from 2005-2013 will be reviewed. Part 5 is a review of the issues in government contracting that might affect the ADA, including which fiscal year to charge when modifying contracts (including “incrementally funding”) and settling claims. The participants will receive a detailed course outline and review exercises.

FCN TRI - The Trifecta: Price Analysis, Cost Analysis and Contract Negotiation - New!

The government relies on contractor pricing proposals and cost representations to establish prices and/or reimburse actual costs. In this regard, the burden is on the contractor to demonstrate that prudent business actions have been taken to determine that the prices paid to lower tier suppliers are fair and reasonable. In addition, the contracting officer has a responsibility to assure that the government pays a fair and reasonable price for the goods and services it acquires. This course is designed to provide specific guidance in performing and documenting price analysis and cost analysis for goods and services acquired for government contracts and subcontracts. Participants will perform a simulated contract award through the application of cost analysis, participate in a simulated negotiation using cost analysis, and conclude with a comprehensive review of price and cost analysis, using a question and answer game style format that maximizes student interaction.

Learning Objectives:

- Understand the Government's requirements for conducting price analysis and cost analysis for government contracts & subcontracts
- Regulatory requirements and expectations related to price analysis and cost analysis
- How and when to perform and document price analysis and cost analysis
- How and when to perform and incorporate technical analysis
- The regulatory requirements and expectations related to estimating systems
- Documenting the results of price analysis and cost analysis
- Conducting negotiations using cost analysis

FCN TOC - Types of Contracts – New!

There is a new emphasis on Contract Types in Government Contracting. In acquisition planning, government agencies have been directed to move away from Cost Type Contracts to Firm Fixed-Price Contracts. This is a one-day in-depth analysis of the new focus and guidelines on the selection, use, and management of contracts by type. Implications on costs, accounting systems, management, and administration of this new emphasis on all contract vehicles will be examined. This course will examine the benefits and risks inherent in all types of contracts.

Contract administration has become a new focal point in the use of contract types. Recent guidance to procurement officials outlines this new emphasis from Acquisition Planning through Contract Closeout. Managing risk and controlling costs throughout the life cycle of procurement will be accomplished through greater oversight and vigilance in administration. An in-depth understanding of Contract Types is critical in this new climate of budgetary and expenditures control.

Learning Objectives:

- Demonstrate why it is important to select the most appropriate type of contract and how to do so
- Identify and list the differences between fixed-price and cost contracts
- Demonstrate how incentive contracts work
- Distinguish between how level of effort and indefinite delivery contracts work
- Apply the basic accounting rules that govern government contracting
- Explain what commercial items contracting and performance-based contracting involve
- Demonstrate ways to effectively and efficiently manage different types of contracts
- Calculate the cost implications of specific types of contracts
- Allocate the costs to contracts as prescribed by the regulations