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The COTR Handbook

A Five-Step Process for Stronger Organizational Performance

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January 2010

Introduction to the book and the Five Step Process

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Recent Trends and Concerns

The Current Position

Facilitating COTR Excellence

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Summary

C. What COTRs can do to strengthen achieving these challenges

D. Overview of ways and means to increase COTRs' success

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A. Situations that give rise to the COTR function

1. Competition
2. Contract
3. What is being purchased?
4. Partnering

B. Various organizational responses to this need

- Small Business Concerns
- Competition
- Other Than Full and Open Competition
- Processing Requirements

C. Non-personal and personal services factors

D. Personnel concerns in administration of the contract

E. What has gone well and means to improve

Step Two – Getting the COTR Onboard

A. Discovering and designating the need for a COTR

- COTR Nomination (see Attachment Four for a Sample Nomination Letter)
- Appointment Responsibilities

B. COTR profile

C. Responsibilities of the COTR

D. Finding and approving the COTR and the other team members

E. Common source selection modes

- Sealed Bidding (FAR Part 14)
- Contracting by Negotiation (FAR Part 15)
- Simplified Acquisitions (FAR Part 13)

F. Special topic: services

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- Initiate Contract Administration
- Administer Contract Changes
- Administer Contract Performance
- Administer Contract Financial Terms
- Perform Other Contract Administration Duties
- Documentation Requirements

H. Ethics in the acquisition lifecycle

I. What has gone well and means to improve

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B. Acquisition lifecycle expertise

Contract Planning

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D. Communications expertise

E. What has gone well and means to improve

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Market Research/Market Surveillance

Purchase Requests

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Purchase Request or Request for Contract

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Statement of Work

Work Package

Inherently Governmental Function Determination

Prepare an Independent Government Cost Estimate

Prepare Evaluation Factors

Prepare a Surveillance Plan

Prepare Other Documentation and Obtain Approvals

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Publicizing the Requirement

Pre-Proposal Conference

Communications with Offerors during Solicitation Period

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I. What has gone well and means to improve

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Training Courses

B. Continuous learning and professional development

Training

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Certification Responsibilities

Certification Policy

C. Certification training requirements

Certification Maintenance Requirements

Continuous Learning Points

D. Broader applications across organizational activities

E. What has gone well and means to improve

Wrap Up

A. Composite summary of lessons learned

B. Ongoing COTR challenges and ways to meet them

C. Ongoing organizational challenges and ways to fulfill them

D. Bridging these challenges through best practices

E. Reference information (see www.acquisition.gov for additional documents and links)