

Introduction and Background

1. This document describes APTAC Core Training for Government Procurement Counselors.
2. **Completion of all recommended training, along with documentation of two years' experience counseling businesses on issues related to government procurement, will qualify the counselor for recognition as a Certified Procurement Counselor**(name of certificate is not final).
3. The recommended training outlined below may also be used by APTAC Program Managers as a stand-alone recommendation for counselor training, if they wish.
4. The recommended training recognizes the importance of both academic and experiential learning by including:
 - a. DAU Continuous Learning Modules that provide a common core of procurement knowledge and understanding and
 - b. The Knowledge, Skills and Abilities developed primarily through the practice and application of procurement knowledge.
5. The recommendations are listed in two tables below:
 - a. **Table I** describes the observable knowledge, skills and abilities that demonstrate the counselor's ability to apply procurement knowledge in counseling practice.
 - i. These skills may be gained on-the-job through actual experience with clients.
 - ii. These skills may be enhanced through training received at APTAC Conferences.
 - iii. Program managers may determine the most appropriate method for training counselors in their program and verify the observable skills and abilities.
 - b. **Table II** lists the DAU Continuous Learning Modules (CLMs) included in the APTAC Core Training for Counselors.
 - i. All counselors are encouraged to complete the listed CLMs.
 - ii. Completion of all CLMs is required to qualify for the Certified Procurement Counselor designation.

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- iii. Applicants must submit documentation that they have completed all of the recommended CLMs to qualify for the Certified Procurement Counselor designation.

**TABLE I
OBSERVABLE COMPONENTS
APTAC KNOWLEDGE, SKILLS, AND ABILITIES**

Notes:

1. Where a reference is cited, the counselor should have read the reference and be familiar with its contents.
2. Verification may be accomplished by Program Manager review, submission of white papers, peer review, or any other manner deemed appropriate by the local PTAC Program Manager.
3. Program Managers may, at their option, choose to incorporate the verification process as a part of annual or periodic performance reviews, Counselor-conducted briefings at regular staff meetings, follow-up reports on training received, etc.
4. Codes in left-hand column refer to BOK designations for the knowledge element
5. Right-hand column is for your use as a checklist to track your progress or record verification dates, initials of verifiers, etc.

BOK Reference	Description of Knowledge Area	Ck/In
F. Program <u>Admin and Reporting</u>	Purpose of PTAP Program <ul style="list-style-type: none"> • PTAC Mission • Legislation establishing program • DoD Procurement Technical Assistance Centers website • Differences in Cooperative Agreements and Contracts • How Solicitations Are Issued 	
F Program <u>Admin and Reporting</u>	APTAC <ul style="list-style-type: none"> • APTAC Mission • Organization • Support for your local PTAC • APTAC website http://www.aptac-us.org <ul style="list-style-type: none"> ○ Collaboration ○ Official Documents ○ News ○ Information and References ○ Professional Training Records ○ Leadership ○ Committee Pages 	
F Program <u>Admin and Reporting</u>	Program (SCAA) Vocabulary <ul style="list-style-type: none"> • This is intended to focus on definitions listed in the current SCAA and used in local PTAC Operating Procedures 	

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<p>F Program</p> <p><u>Admin and Reporting</u></p>	<p>Program (SCAA) Record Keeping Requirements</p> <ul style="list-style-type: none"> • Reference your local PTAC Standard Operating Procedures. • At a minimum, counselor understands how to record a counseling session that meets the standard for SCAA Reporting 	
<p>F Program</p> <p><u>Client Intake</u></p> <p>E Comm Skills</p> <p><u>Counseling Skills</u></p>	<p>Introduction to Government Procurement Counseling</p> <ul style="list-style-type: none"> • Client Qualification • Establishing Rapport • Active Listening • Needs Assessment • How to handle challenging situations in counseling 	
<p>B Basics</p> <p><u>Socio-Economic Programs</u></p>	<p>Small Business and Socio-Economic Programs – FAR 19</p> <ul style="list-style-type: none"> ➤ Small Business Set-Asides ➤ Large Business "Subcontracting Plans" ➤ 8(a) Program - <ul style="list-style-type: none"> ▪ Certification Requirements ▪ Competitive Set-asides ▪ Sole source procurements. ▪ HUBZone Program ▪ Certification Requirements ▪ Use in contracting ➤ SDVOSB <ul style="list-style-type: none"> ▪ Certification Requirements ▪ Use in contracting ➤ Woman-Owned Business Program <ul style="list-style-type: none"> ▪ Section 8(m) Requirements ▪ Use in contracting ➤ Department of Transportation DBE Program <ul style="list-style-type: none"> ▪ Certification of DBEs ▪ Advantages in Federal Highway Projects ➤ Javits-Wagner-O'Day Act <ul style="list-style-type: none"> ▪ Ability One ▪ FAR Part 8 Order of Precedence for sources 	
<p>B Basics</p> <p><u>???</u></p>	<p>Small Business Offices/SADBUS at buying activities</p>	
<p>B Basics</p> <p><u>???</u></p>	<p>Small Business Administration</p>	
<p>E Basics</p> <p><u>???</u> <u>Socio-Econ programs???</u></p>	<p>Resource Partners</p> <p>Counselor is familiar with resources available to clients in their area - Some examples: SCORE, SBDCs, MEPs, SBTRCs, VOBOCs, Women's Business Centers, Business Information Centers,</p>	

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	Minority Business Development Centers, and the Center for Veteran Entrepreneurship	
B Basics <u>Source Selection</u>	FAR Part 9 Contractor Qualifications 1. Contractor Qualifications (Responsibility) 2. Be familiar with and able to assist with pre-award surveys	
B Basics <u>Commercial Items Acq</u>	FAR Part 12 Acquisition of Commercial Items	
B Basics <u>Bids and Solicitations</u>	FAR Part 13 Simplified Acquisition Procedures <ul style="list-style-type: none"> • Request for Quotation (RFQ) • Demonstrated ability to review solicitations and client offers for completeness and responsiveness 	
B Basics <u>Bids and Solicitations</u>	FAR Part 14 Sealed Bidding <ul style="list-style-type: none"> • Invitation for Bid (IFB) 	
B Basics <u>Bids and Solicitations</u>	FAR Part 15 Contracting by Negotiation <ul style="list-style-type: none"> • Request for Proposals (RFP) 	
A General <u>Financial</u> B Basics <u>Financial Aspects</u>	Demonstrate familiarity with types of costs, direct and indirect rates, profit and fee calculations, and specific price and cost analysis formats. <ul style="list-style-type: none"> • Should be familiar with DCAA Information for Contractors - DCAA Pamphlet No. 7641.90 	
B Basics <u>Federal Acquisition Regulations</u>	FAR 52 and FAR MATRIX	
B Basics <u>Federal Acquisition Regulations</u>	Able to find FAR references online	
E Comm <u>Counseling Skills</u>	Understand resources available through the AT&L Knowledge Sharing System, including the Defense Acquisition Deskbook	
E Comm <u>Counseling Skills</u> A General <u>Marketing</u>	Demonstrated ability to assist clients with and teach them to conduct market research, including the use of online tools. Example: Uses FBO and other web sites such as FPDS to find appropriate solicitations, award information, and military specs for clients.	

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<p>E Comm <u>Counseling Skills</u> B Basic <u>Buying Cycle</u></p>	<p>Demonstrated ability to help clients find appropriate solicitations, technical data, and other information needed to submit offers. Examples: 1. Finding specifications and standards 2. Using online bidding systems.</p>	
<p>E Comm <u>Counseling Skills</u> B Basics <u>E-Business</u></p>	<p>Demonstrated ability to assist clients with government Electronic Business applications, including but not limited to:</p> <ul style="list-style-type: none"> • Reverse Auctions • Specifications • Agency Bid Boards such as DIBBS, NECO, and FedConnect 	
<p>E Comm <u>Counseling Skills</u> B Basics <u>E-Business</u> A Gen</p>	<p>Credit Card Purchases: Demonstrated understanding of credit card purchases, including referrals for clients who need to establish merchant accounts</p>	
<p>E Comm <u>Counseling Skills</u> B Basics <u>Bids and Solicitations</u></p>	<p>Negotiated Purchases above the SAP Threshold: Demonstrated ability to review solicitations and client offers for completeness and responsiveness</p>	
<p>E Comm <u>Counseling Skills</u> B Basics <u>Bids and Solicitations</u> A General <u>Marketing</u></p>	<p>Demonstrated ability to assist clients with GSA Schedules: 1. Finding the appropriate GSA Schedule, where one exists 2. Accessing required training 3. Accessing prices on GSA Advantage 4. Submitting a proposal</p>	
<p>B. Basics <u>E-Business</u></p>	<p>Understand the use of Digital Certificates and be able to help clients find appropriate resources when certificates are required for government contracts.</p>	
<p>B Basics <u>Buying Cycle</u></p>	<p>Explain Indefinite Delivery Indefinite Quantity Task Order/Delivery Order Contracting Concept</p>	
<p>B Basics <u>Buying Cycle</u></p>	<p>Explain Contract Base and Option Years</p>	
<p>C Specialized <u>Sbir/Sttr</u></p>	<p>Discuss the Small Business Innovation Research and Small Business Technology Transfer Programs</p> <ul style="list-style-type: none"> • Reference local PTAC Operating Instructions 	
<p>E Comm <u>Counseling</u></p>	<p>Demonstrated ability to assist clients with federal, state, and local government vendor registration requirements</p>	

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<p><u>Skills</u> Basics <u>CCR</u> <u>Reps and Certs</u></p>	<p>(For example, CCR and ORCA)</p>	
<p>B Basics <u>FAR</u> <u>Buying Cycle</u> D Government vs Commercial Contracts <u>SF 1449</u></p>	<p>Contract Formation Basics – Understand the following</p> <ul style="list-style-type: none"> • Legal requirements • Authority Issues • Contractor Qualifications under FAR 9 • Scope of contract • Federal Acquisition Regulation • Organization of the FAR and the system of Supplements • Code of Federal Regulations 	
<p>B Basics <u>Socio-Economic Programs</u></p>	<p>Understand and explain the purpose of Mentor-Protégé programs.</p> <ul style="list-style-type: none"> • Be familiar with DoD M-P Program • Be familiar with the SBA 8(a) M-P Program • Be able to locate information on Mentor-Protégé Programs for other agencies, such as NASA, DHS, and GSA 	
<p>A. General <u>Marketing</u></p>	<p><i>Communication with Agencies and Protocol:</i></p> <ul style="list-style-type: none"> • Explain how to approach agency staff • Discuss networking, telephone calls, and email 	
<p>E Instruct</p>	<p>Instructional Skills</p> <ul style="list-style-type: none"> • Develop instructional materials for client use or counselor training • Deliver training instruction (seminar; webinar; conference presentation) 	

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TABLE II
Specialized Core Knowledge Course Recommendations
Course Work Required for CPC Certification

Notes:

1. These courses, or equivalents **determined by the Professional Review Board***, are required to earn the CPC certificate.
2. The PRB and Education Committee will review and update list periodically. Submit transcripts or certificates to Mary McGovern at ATC@aptac-us.org to receive credit.
3. Codes in left-hand column refer to BOK designations for the knowledge element
4. Right-hand column is for your use as a checklist to track your progress or record verification dates, initials of verifiers, etc.

B Fin	CLB 007 Cost Analysis	
B Fin	CLB 029 Rates	
B SubK	CLC 001 Defense Subcontract Management	
A Mkt B BuyCyc	CLC 004 Market Research	
B FAR	CLC 005 Simplified Acquisition Procedures	
B FAR	CLC 006 Contract Terminations	
B Ssel	CLC 007 Source Selection	
B Fin	CLC 008 Indirect Costs	
B SocEc	CLC 009 Service Disabled Veteran Owned Small Business Program	
B FAR	CLC 011 Contracting for the Rest of Us	
B FAR	CLC 020 Commercial Item Determination	
C ByAm	CLC 027 Buy American Act	
B P Perf	CLC 028 Past Performance	
B Bid	CLC 031 Reverse Auctioning	
B FAR	CLC 046 Green Procurement	
B FAR	CLC 055 Competition Requirements	
B Fin	CLC 104 Analyzing Profit or Fee	
B Post	CLC 106 Contracting Officer's Representative with a Mission Focus	
C ByAm	CLC 125 Berry Amendment	
B Fin	CLC 131 Commercial Pricing	
B FAR F Eth	CLC 132 Organizational Conflicts of Interest	
A Prod	CLE 004 - Introduction to Lean Enterprise Concepts	
A Prod B PkTrSh	CLE 040 – IUID Marking	
A QA	CLE 201 – ISO 9000:2000	
B FIN	CLG 001 DOD Government Purchase Card	

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A Prod B PkTrSh	CLL 013 – DoD Packaging	
B FAR B SSel	CLM 023 Javits Wagner O'Day	
B FAR	CLM 024 Contracting Overview	
C ITAR	CLM 036 - Technology Transfer and Export Control Fundamentals	
A QA B Post	CLM 103 Quality Assurance Auditing	
B PkTrSh	CLM 044 – Radio Frequency Identification	
A Prod B PkTrSh	CLM 200 – Item Unique Identification	
C SbirSttr	FAC 010 Small Business Innovation Research /Small Business Technology Transfer (SBIR/STTR)	
B FAR	FAC 014 Time and Materials Contracts	
C ByAm	FAC 016 Buy American Act	
B SocEc	FAC 031 Introduction to Small Business	
B FAR	FAC 032 Small Business: A Requirements Approach	

*Example: Many members have completed workshops on RFID and IUID that would substitute for CLM 044, CLE 040,