



Summary for Performance-Based Acquisition (5-days) (GCP-DKP)

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Module Number and Name	Topics	Learning Objectives	Instruction/Assessment Methods
Overview (course objectives)	<ul style="list-style-type: none"> • Course Logistics • Course Scope • Course Objectives • Participant Introductions 	<ul style="list-style-type: none"> • Describe the concepts and implementation of performance-based acquisition • Perform market research to determine possible public and private sector sources and solutions • Perform a job analysis in preparation for writing a clear and concise performance work statement • Develop and apply an effective quality assurance plan • Develop performance measures • Use the key tools of PBA to effectively manage contract performance • Structure a team that is qualified to manage performance assessment • Facilitate a partnering relationship between government contract monitors and the contractor • Employ a recordkeeping and documentation process throughout the performance assessment cycle • Monitor contracts using key tools of PBA, such as metrics, surveillance plans, standards, and incentives • Develop and implement a change management plan • Avoid or resolve conflict using effective methods for settling disputes and maintaining good working relationships • Authorize payment properly and close out the contract • Use innovative ideas and practical tips when managing PBAs 	<ul style="list-style-type: none"> • Lecture/seminar • Class discussion

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1. Performance-Based Acquisition	<ul style="list-style-type: none"> • Objectives of performance-based acquisition • Government definitions of and policy on PBA • Definition of performance-based acquisition and key terms • Services acquired by PBA • The seven steps in PBA • Benefits and challenges of performance-based acquisition 	<ul style="list-style-type: none"> • Explain federal government policy regarding performance-based acquisition • Identify key activities in implementing performance-based acquisition • Explain the importance of a team approach to meeting acquisition needs • Describe roles and responsibilities in performance-based acquisitions • Recognize the requirements for performance-based acquisition • Describe the benefits and challenges of performance-based acquisition • Identify key elements of performance-based acquisition • Define key terms in performance-based acquisition 	<ul style="list-style-type: none"> • Lecture/seminar • Class discussion • Exercise 1-1: Performance-Based Contracting is Not New • Exercise 1-2: Writing a Performance Work Statement
2. Team Roles and Responsibilities	<ul style="list-style-type: none"> • Role of the Acquisition Team • Expectations and rules for acquisition teams set by FAR • Critical success factors for PBA teams • Key roles of PBA management team • Attributes of high-performance, results-focused acquisition teams 	<ul style="list-style-type: none"> • Apply Federal Acquisition Regulation (FAR) guidance on acquisition teams to managing PBAs • Recognize critical success factors for the PBA management team and ways to foster a successful team • Describe the roles of the players in managing a PBA • Promote key strategies for the important roles on the PBA management team 	<ul style="list-style-type: none"> • Lecture/seminar • Class discussion
3. Determination of Needs and Market Research	<ul style="list-style-type: none"> • Determination of needs • Needs recognition • Forecasting requirements • What is market research? • Surveillance and investigation • Who performs market research? • Why perform market research? • Data that can be identified • Market research and commerciality • Market research techniques 	<ul style="list-style-type: none"> • Explain the requirements for and importance of market research • Describe techniques for conducting market research • Examine public-sector sources and solutions • Examine private-sector sources and solutions • Describe the benefits and process of forecasting requirements and acquisition planning 	<ul style="list-style-type: none"> • Lecture/seminar • Class discussion

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	<ul style="list-style-type: none"> • Public sources and solutions • Private sources and solutions • Meeting with industry • Acquisition planning • Elements of a typical acquisition plan 		
4. Job Analysis	<ul style="list-style-type: none"> • Tasks in job analysis • Work analysis <ul style="list-style-type: none"> • Develop scope statement • List tasks to be performed • Group and organize tasks • Identify relationships among tasks/develop WBS • Identify data requirements • Identify government-furnished property • Performance analysis <ul style="list-style-type: none"> • Develop performance standards • Determine acceptable quality levels (AQLs) • Identify incentives/penalties • Create a performance requirements summary (PRS) • Evaluation analysis <ul style="list-style-type: none"> • Surveillance methods • What to measure • Ways to measure • Cost estimate • Choose appropriate contract type <ul style="list-style-type: none"> • Monetary Incentives in specific contract structures 	<ul style="list-style-type: none"> • Link acquisition to mission-related performance goals and objectives • Perform work analysis after identifying activity needs and tasks to be accomplished and presenting them in a WBS • Create the basis for performance analysis by establishing performance standards • Document desired outcomes, required services, performance standards, acceptable quality levels, monitoring methods, and incentives in a performance requirements summary (PRS) • Create an incentive strategy tailored to the acquisition • Create the basis for evaluation analysis by determining measurements and surveillance methods • Estimate the cost of work to be performed • Apply federally mandated contract-type order of precedence • Determine the appropriate contract type for a specific requirement 	<ul style="list-style-type: none"> • Lecture/seminar • Class discussion • Exercise 4-1: Work Analysis • Exercise 4-2: Performance Analysis • Exercise 4-3: Evaluation Analysis

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5. Developing the Performance Work Statement and Quality Assurance Plan	<ul style="list-style-type: none"> • Elements of a PBA: performance work statement (PWS) • Importance of the PWS • FAR guidance • Types of specifications • The SOO and the SOW in performance-based contracting • Statements of objectives (SOOs) • Guidelines for writing the PWS • Elements of a PBA: quality assurance plan (QAP) • Guidelines for writing the QAP • Right to change measures and methods 	<ul style="list-style-type: none"> • Describe the role of the PWS in the performance-based contract • Develop a clear and concise PWS • Describe the value of using a standardized PWS format • Recognize the government's right to review and revise performance measures • Develop an effective quality assurance plan (QAP) 	<ul style="list-style-type: none"> • Lecture/seminar • Class discussion • Exercise 5-1: Unnecessarily Complicated Words and Phrases • Exercise 5-2: Writing the Performance Work Statement – Putting It All Together
6. Source Selection and Contract Administration	<ul style="list-style-type: none"> • What comes next? • Choosing the right contractor • Evaluation standards <ul style="list-style-type: none"> • Absolute standards of evaluation • Minimum standards of evaluation • Relative standards of evaluation • Evaluation procedures • Crucial success factor for monitoring PBA awards • Dispute resolution 	<ul style="list-style-type: none"> • Describe team roles and responsibilities for contract administration • Describe the three different approaches to standards (absolute, minimum, and relative) • Outline the key components of the postaward phase when using PBA 	<ul style="list-style-type: none"> • Lecture/seminar • Class discussion • Exercise 6-1: Dispute Resolution
7. Communicating with the Contractor	<ul style="list-style-type: none"> • Performance-based business relationship • Instituting a business alliance for performance management • Postaward orientation conference • Ethical considerations and advice 	<ul style="list-style-type: none"> • Maintain an effective relationship with the contractor using a partnership approach • Build a communication plan for the performance monitoring process • Convene a successful postaward orientation conference • Take measures to assure ethical behavior on the 	<ul style="list-style-type: none"> • Lecture/seminar • Class discussion • Case Study 7-1: Post-award Orientation Conference

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		part of the entire PBA management team—government and contractor	
8. Monitoring Performance	<ul style="list-style-type: none"> • Performance-based monitoring (vs. traditional) • Monitoring methods • Use of performance standards • What to measure and ways to measure • How to monitor performance—tools and best practices • Managing contract performance • Actions and remedies • Apply and reassess incentives 	<ul style="list-style-type: none"> • Recognize the difference between traditional and PBA monitoring • Identify performance-based monitoring methods • Utilize the inspection clause and quality plan to monitor contractor performance • Apply surveillance information gained through monitoring to manage contract performance • Employ past performance reports as an incentive in managing PBAs 	<ul style="list-style-type: none"> • Lecture/seminar • Class discussion • Exercise 8-1: Managing a PBA • Case Study 8-1: How Is the Contractor Doing?
9. Managing Contract Changes	<ul style="list-style-type: none"> • Types of changes • The Changes clause • Anticipating change • Risk management in PBA • Roles in PBA modifications • Contract change considerations • Contract modification process • Change management in PBA 	<ul style="list-style-type: none"> • Describe the types of changes and the use of the Changes clause in contract management • Recognize the potential benefits of change • Plan contract changes in a systematic and predetermined, repeatable manner • Manage change in PBAs • Analyze proposed changes and modify the PBA 	<ul style="list-style-type: none"> • Lecture/seminar • Class discussion • Case Study 9-1: Writing a Modification
10. Conflict Resolution	<ul style="list-style-type: none"> • Dispute resolution law and regulation • Claims • Dispute resolution process • Contract clauses to remedy claims • PBA—a conflict avoidance strategy • Beyond disputes and litigation 	<ul style="list-style-type: none"> • Describe legal and regulatory guidance on contract disputes • Manage disputes according to the conflict resolution process • Utilize PBA as a strategy to avoid or deal with disputes • Apply alternative dispute resolution (ADR) processes to avoid costly litigation • Analyze a Board of Contract Appeals case involving a PBA 	<ul style="list-style-type: none"> • Lecture/seminar • Class discussion • Exercise 10-1: Dispute Resolution: Lessons Learned at the Board

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11. Payment and Closeout	<ul style="list-style-type: none"> • Payment in PBA—motivation for results • The payment process • Final payment and discharge • Withholding payment • Performance-based payments • Advance payments • Contract closeout • Innovations and new trends in PBA Techniques 	<ul style="list-style-type: none"> • Relate performance-based strategies to contract payment policies • Certify invoices and authorize payment properly, according to contract clauses • Close out the contract 	<ul style="list-style-type: none"> • Lecture/seminar • Class discussion • Exercise 11-1: Making Payments in PBA
Course Closeout			<ul style="list-style-type: none"> • 25 question multiple-choice exam • Participant evaluations