

Rio Grande Chapter

The Contract Management Standard:
The Foundation of Workforce Development and Competence

Presented by:
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CPCM, CFCM, Fellow
President, tHInc, LLC

January 31, 2024

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Agenda

- A. Leadership
- B. Management
 - 1.0 Guiding Principles
 - 2.0 Pre-Award
 - 3.0 Award
 - 4.0 Post-Award
- C. Learn



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Description

Competence in contract management is a direct result of the Contract Manager's ability to apply leadership, management, and technical competencies as a single, integrated process. This session explores the *Contract Management Standard* (CMS) and the *Contract Management Body of Knowledge* (CMBOK) through the flow of the CMBOK Competency System.

This System presents the interactive relationships of the CMS and CMBOK domains, competencies, and job tasks, which are independently and jointly performed by buyers and sellers.



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The Road to the CMS



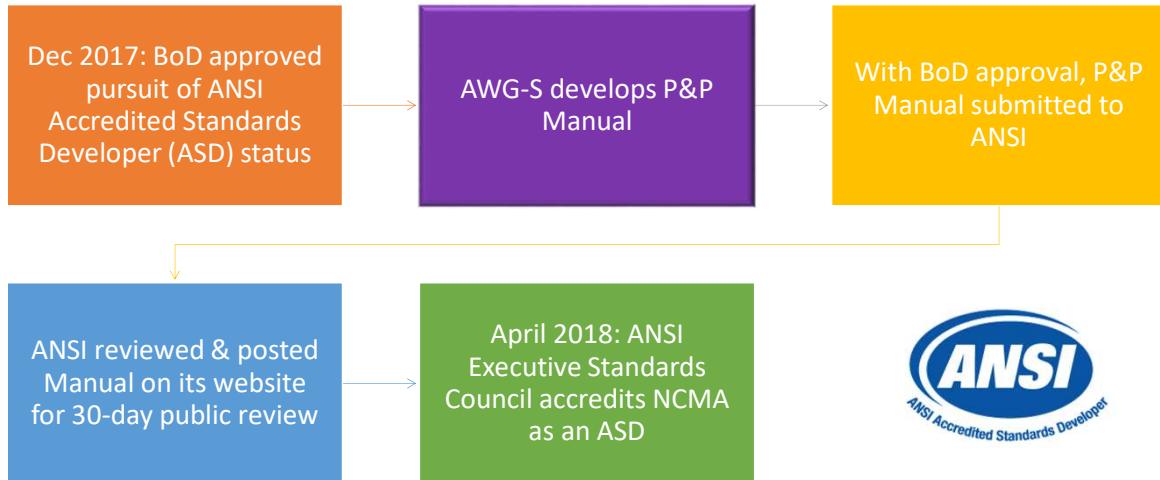
Step 1



Step 2

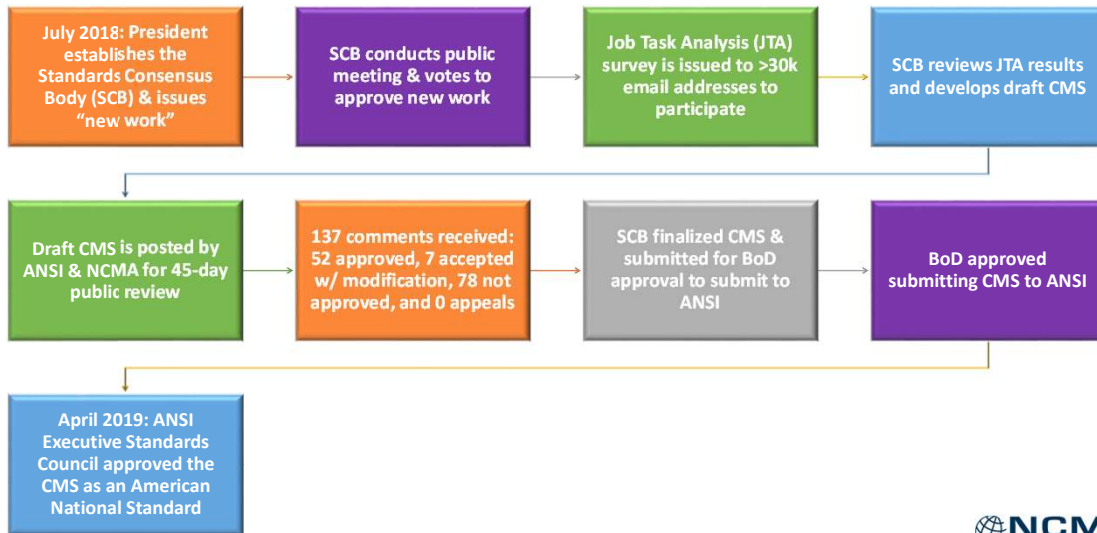
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Step 1—ASD Status



5

Step 2—ANS Approval



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CMS Structure

Source (free download):
[https://www.ncmahq.org/
Standards & Certification](https://www.ncmahq.org/Standards & Certification)

AND

CMBOK Annex

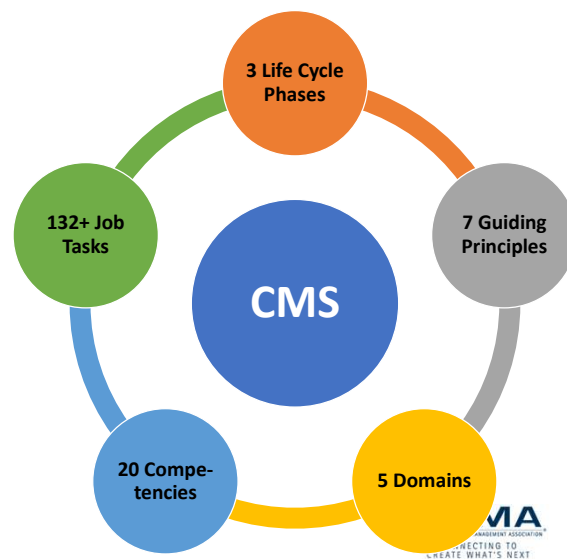


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Purpose of the CMS

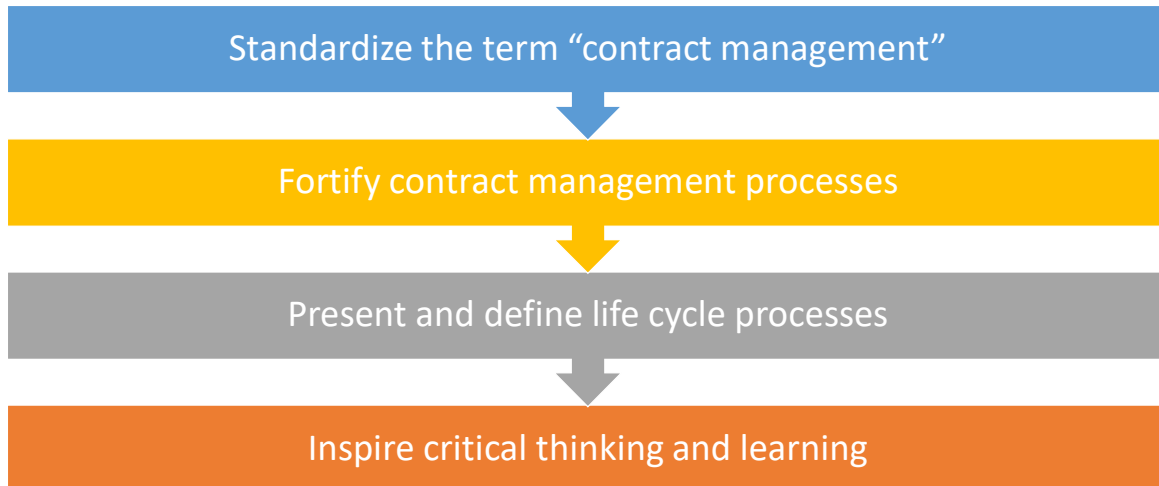
The **purpose** of the CMS is to describe contract management in terms of the processes created through the integration and interaction of job tasks and competencies, and the purposes they serve.

CMS by the Numbers



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Intent of the CMS



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CMS Definitions

Contract—a legally enforceable agreement for the sale, purchase, or lease of products, goods, supplies, or services; or the construction, alteration, or repair of real property. The agreement is either an exchange of promises to act or refrain from acting in a specified way (bilateral contract) or an exchange of an act for a promise (unilateral contract, e.g., a purchase order). To be legally enforceable such agreements must satisfy the requirements of pertinent government laws, codes, and regulations; the common law of contracts; and treaties or other international agreements.

- Contracts include acquisitions, grants, leases, orders, procurements, purchases, subcontracts, and other legally enforceable agreements consistent with the above description.
- Orders may be awarded as standalone contracts themselves or as an order made against a previously awarded contract.



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CMS Definitions

- **Contract management**—the actions of a contract manager to develop solicitations, develop offers, form contracts, perform contracts, and close contracts.
- **Contract manager**—the authorized representative or agent for a contracting party.
- **Contract performance**—the execution of the terms of a contract.
- **Customer**—the recipient or user of goods or services delivered under a contract.



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Contract Management Standard (Third Edition)			
1.0 Guiding Principles	2.0 Pre-Award	3.0 Award	4.0 Post-Award
1.1 Skills and Roles	2.1 Develop Solicitation	3.1 Form Contract	4.1 Perform Contract
1.2 Contract Principles	2.1.1 Plan Solicitation	3.1.1 Price or Cost Analysis	4.1.1 Administer Contract
1.3 Standards of Conduct	2.1.2 Request Offers	3.1.2 Plan Negotiations	4.1.2 Ensure Quality
1.4 Regulatory Compliance	2.2 Develop Offer	3.1.3 Select Source	4.1.3 Manage Subcontracts
1.5 Situational Assessment	2.2.1 Plan Sales	3.1.4 Manage Disagreements	4.1.4 Manage Changes
1.6 Team Dynamics	2.2.2 Prepare Offer		4.2 Close Contract
1.7 Communication and Documentation			4.2.1 Close Out Contract

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The CMS is applicable to:

1. All acquisitions, grants, leases, orders, procurements, purchases, subcontracts, and any other types of legally enforceable contracts—from credit card purchases to major system acquisitions;
2. Any organization that works with any type of contract [e.g., government (federal, state, and local), industry (business-to-business, business-to-government, large business, mid-size business, small business), subcontractors (all tiers)];
3. Any oversight activity involving contract procedural, regulatory, and statutory compliance (e.g., appeals, arbitration, audits, legal opinions and decisions, litigation, performance management reviews, protests, risk assessments);



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The CMS is applicable to:

4. Any organization developing training courses and programs or education courses and curricula (e.g., schools, colleges, training providers, professional associations); and
5. Any individual interested in developing and increasing competence or any organization interested in expanding its workforce capability [e.g., focus scarce resources (personnel, money, equipment, time, etc.) to target competence gaps; achieve certification; obtain meaningful results].



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CMS = Dot One



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Who Uses the CMS?

• US Government

- DAU and FAI have incorporated the CMS into their Contracting Competency Model
- The CMS “complies with section 861 of the Fiscal Year 2020 National Defense Authorization Act (Public Law 116-92)”

• National Defense Industrial Association—Integrated Program Management Division (NDIA-IPMD)

- Contracts Committee is aligning EIA-748 (*Standard for Earned Value Management Systems (EVMS)*) with CMS & CMBOK verbiage
- Intended to enhance the alignment between contract management and integrated program management practitioners



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Who Uses the CMS?

- **State of North Carolina, Division of Purchase & Contract**

- North Carolina Contract Manager (NCCM) Training & Certification Program is based on the CMBOK and State procurement regulations
- Pilot delivered Aug 2019 – Feb 2020
- Multiple rounds completed and going strong

- **National Association of Procurement Officials (NASPO)**

- Teamed with NCMA to develop and deliver the Contract Management Organizational Capability State Training Certificate Program (CMOC)
- Based on CMS, CMBOK, NASPO best practices, and State procurement rules
- Pilot with DC delivered Feb – Apr 2022 and going strong

- **NCMA CEO**

- APM 4-2 (Financial Management): “The CEO shall approve and execute contracts IAW the CMS.”



Who Uses the CMS?

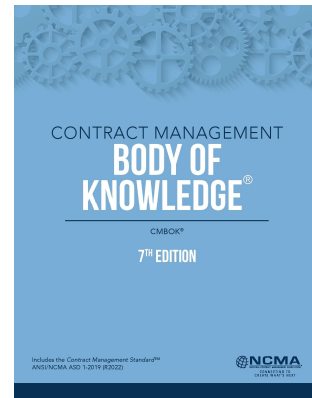
Industry Adopters



Higher Education Adopters



CMBOK Structure



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CMBOK

- Built upon the competencies identified in the CMS and organized through the *CMBOK Competency System*.
- Provides the knowledge necessary to effectively execute contract management processes.



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CMBOK Content

Chapters

1. The Contract Management Framework
2. CMBOK Overview
3. Leadership
4. Management
5. Guiding Principles
6. Pre-Award
7. Award
8. Post-Award
9. Learn
10. Abbreviations, Acronyms, and Lexicon

Annex



Appendices

1. Position Standards for Contract Managers
2. CM Curricula Models
3. CM Continuing Professional Education Guide
4. CMBOK Competency and Knowledge Matrix
5. Organizational Capability Measurement
6. Contract Management Organizational Capability Survey
7. Best Practices in State and Local Government Contract Management
8. Uniform Commercial Code ToC
9. Federal Acquisition Regulation ToC
10. CMS-FAR-OPM Acquisition Workforce Matrix
11. CMBOK Changes and Evolution
12. CMBOK Contributors and Reviewers



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Contract Management Standard (third Edition)				
	1.0 Guiding Principles	2.0 Pre-Award	3.0 Award	4.0 Post-Award
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	1.6 Team Dynamics	2.2.2 Prepare Offer		4.2 Close Contract
	1.7 Communication and Documentation			4.2.1 Close Out Contract


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Contract Management Body of Knowledge Outline of Competencies (7th Edition)						
A. Leadership	B. Management	1.0 Guiding Principles	2.0 Pre-Award	3.0 Award	4.0 Post-Award	C. Learn
A.1 Competence	B.1 Business Management	1.1 Skills and Roles	2.1 Develop Solicitation	3.1 Form Contract	4.1 Perform Contract	C.1 Continuous Learning
A.2 Character	B.2 Change Management	1.2 Contract Principles	2.1.1 Plan Solicitation	3.1.1 Price or Cost Analysis	4.1.1 Administer Contract	C.2 Individual Competence
A.3 Collaboration	B.3 Financial Management	1.3 Standards of Conduct	2.1.2 Request Offers	3.1.2 Plan Negotiations	4.1.2 Ensure Quality	C.3 Organizational Capability
A.4 Emotional Intelligence	B.4 Project Management	1.4 Regulatory Compliance	2.2 Develop Offer	3.1.3 Select Source	4.1.3 Manage Subcontracts	
A.5 Vision	B.5 Risk Management	1.5 Situational Assessment	2.2.1 Plan Sales	3.1.4 Manage Disagreements	4.1.4 Manage Changes	
	B.6 Supply Chain Management	1.6 Team Dynamics	2.2.2 Prepare Offer		4.2 Close Contract	
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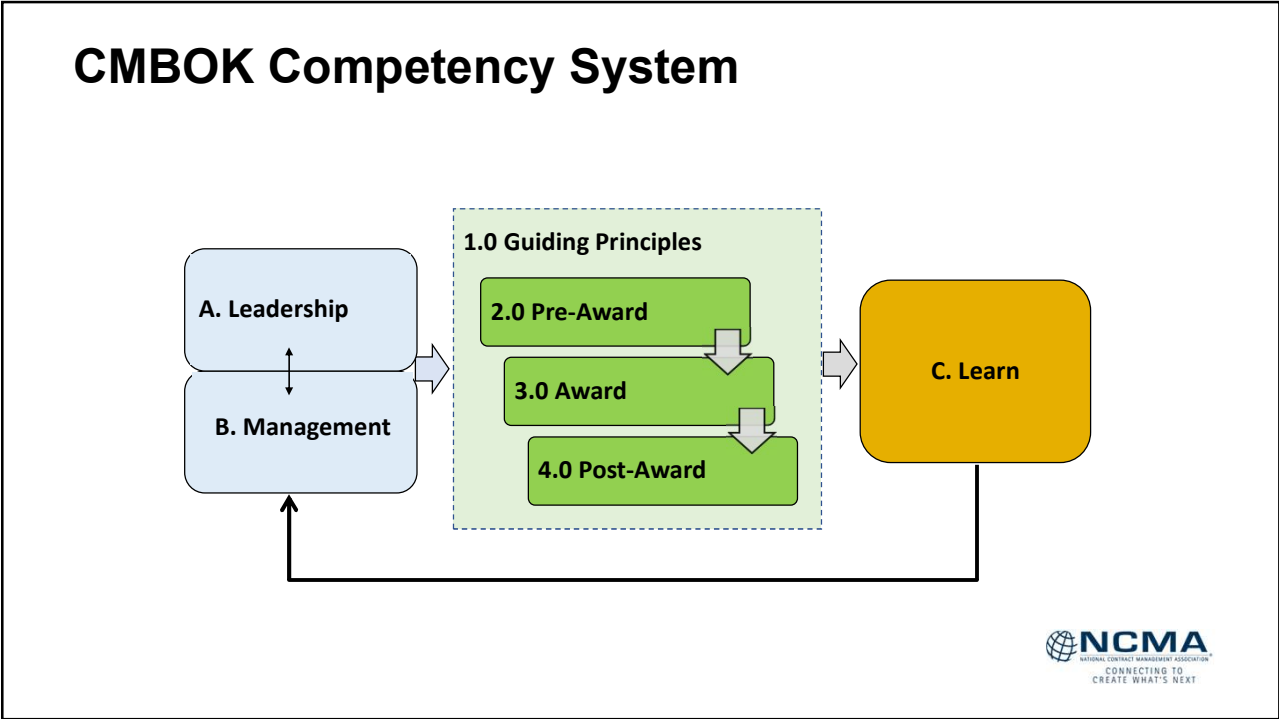
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CMBOK Competency System

- Displays the system of interactive relationships between the CMBOK competencies.
- Serves as a roadmap for the presentation of the CMBOK.



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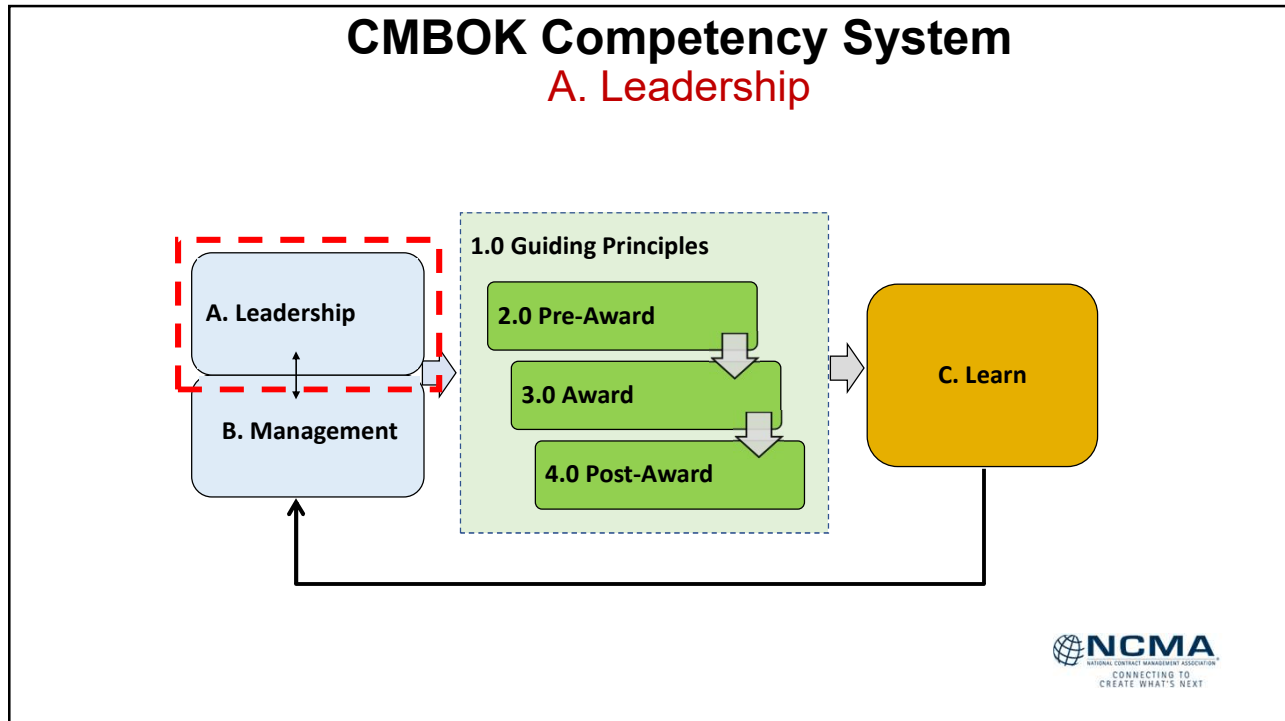


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CMS & CMBOK Comparison

	CMS	CMBOK
Purpose	Describes contract management in terms of the processes created through the integration and interaction of job tasks and competencies, and the purposes they serve.	Provides a common understanding of the terminology, practices, policies, and processes used in contract management.
Approach	Provides explanations of consensus-based domains, competencies, and job tasks in the contract life cycle.	Provides broader and deeper explanations of CMS competencies, and emphasizes leadership, management, and learn competencies.
Design	Presents the contract as a linear system in terms of a product life cycle.	Presents the contract management practice as a circular, interactive system in terms of a competence development model.
Development	Job Task Analysis, SME review & drafting, peer review, and formal comment validation.	Uses the CMS as its foundation, SME input & review, and literature review.
Pages	18	>400

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A. Leadership

- A.1 Competence
- A.2 Character
- A.3 Collaboration
- A.4 Emotional Intelligence
- A.5 Vision

Leadership competency is necessary for the successful performance of contract managers, even when they are not in formal leadership positions. Leadership in contract management facilitates and fortifies all other contract management competencies.

- CMBOK

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Leadership: Yesterday vs Today

Yesterday



Today



If you don't define yourself, especially in tough times, you can be certain someone else will do it for you.

- Jack Welch



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What is Leadership?

- Leader to Follower
 - The ability to influence people and situations to achieve organizational goals
- Follower to Leader
 - A gift followers bestow on a person who:
 1. Advocates for our *competence* (professional development),
 2. Validates our *character* (beliefs and values),
 3. Encourages *collaboration* (high-trust relationships),
 4. Applies *emotional intelligence* (behavior awareness), and
 5. Inspires *vision* (a clear pathway to success).
 - This gift must be earned—and continue to be earned—by the leader



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Question for Consideration

Why do you want to be a leader?

- a) I want to contribute to the leadership development and professional development of others.
- b) Leadership is a powerful choice. I own that choice.
- c) Our current leader needs to step aside so I can do the job right.



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Leadership Roles

Formal
(Appointed)

- Chosen by organization
- Based on position
- Make & enforce decisions

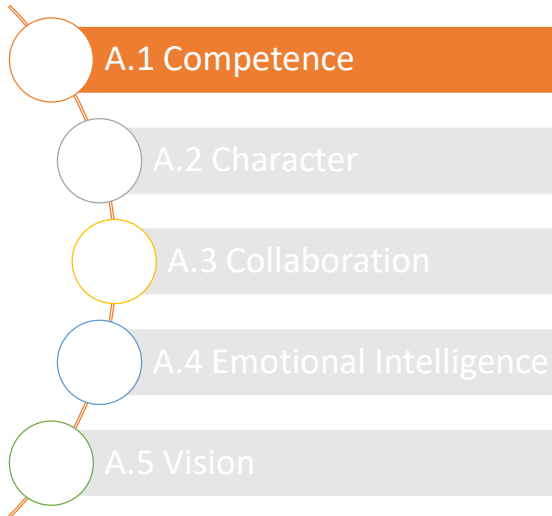
Informal
(Expected)

- Chosen by peers
- Based on reputation
- Influence decisions



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A. Leadership



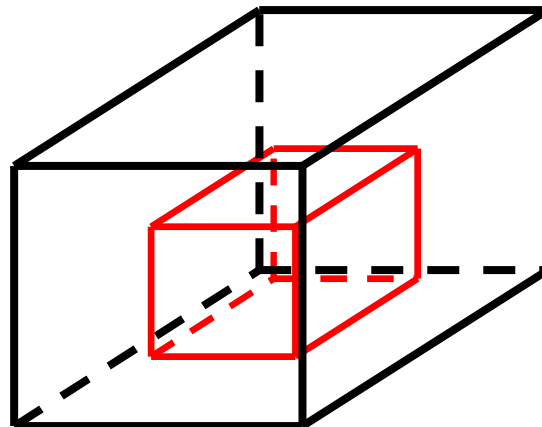
To effectively lead others and to interact with stakeholders, the contract leader must be technically proficient in contract management. This means the leader should have a deep and broad understanding of the practices, policies, and processes inherent to contract management.

- CMBOK

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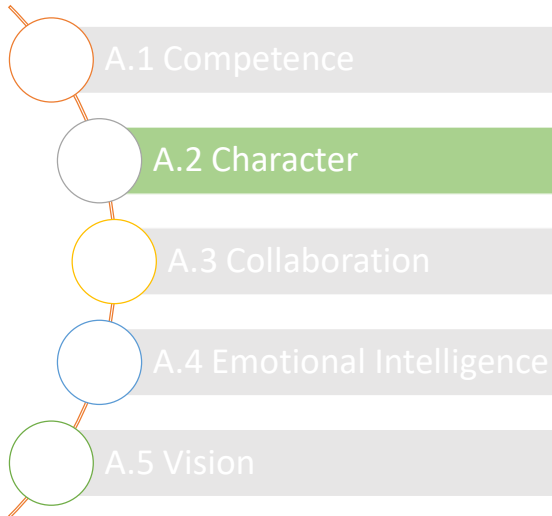
Maximum Effectiveness

Don't think
outside of
the box...
use all of the
box.



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A. Leadership



To be effective, contract leaders must be able to perform contract management within the highest standards of ethical behavior. Contract managers are routinely trusted with sensitive information while collaborating with multiple stakeholders.

– CMBOK

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Principles of Character

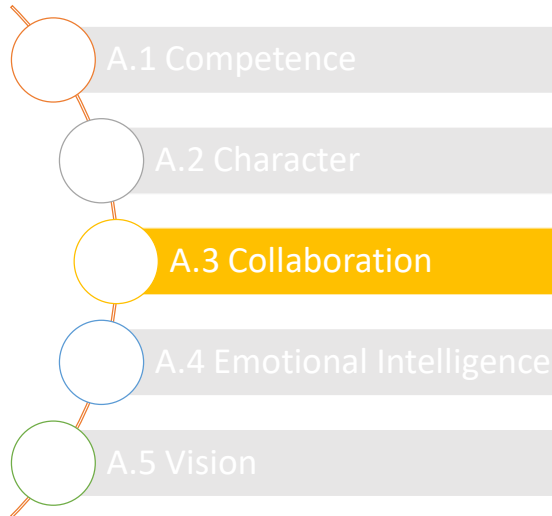
1. Lead by example

2. Character building is a process

3. When stakes are high

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A. Leadership



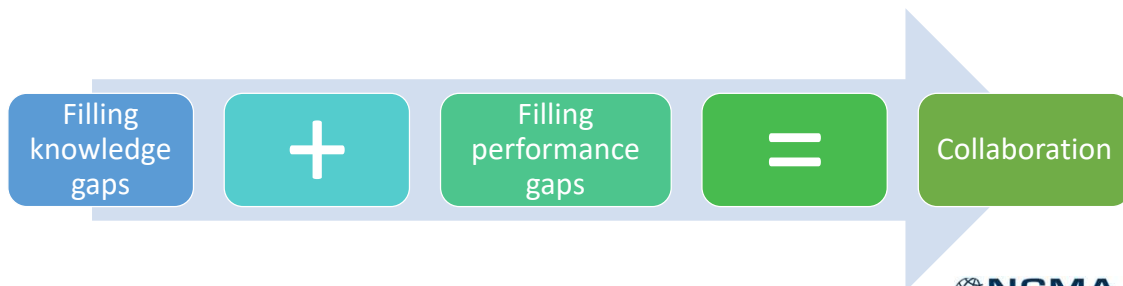
Effective collaboration between contract leaders and contract stakeholders will provide a strong foundation for a successful partnership to accomplish contract performance.

- CMBOK

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Collaboration

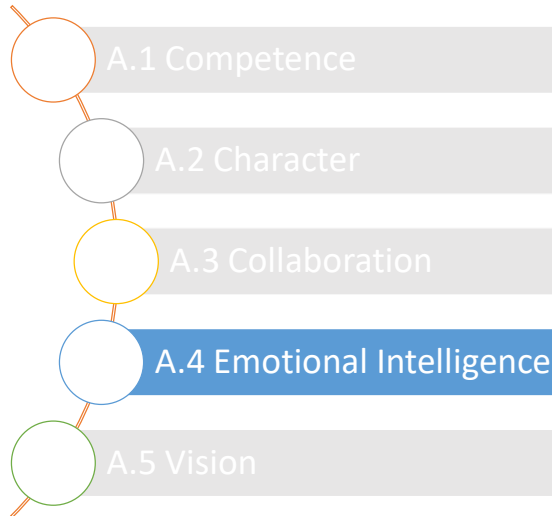
- Why is collaboration important?
 - It is a means of filling knowledge gaps
 - The more you know, the more you realize what you don't know
- Education should inspire curiosity
 - Develop collaboration and research skills to satisfy curiosity



NCMA
NATIONAL CONTRACT MANAGEMENT ASSOCIATION
CONNECTING TO
CREATE WHAT'S NEXT

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A. Leadership



Emotional intelligence is the ability to recognize and understand emotions in yourself and others, and to use this awareness to manage behavior and relationships.

Most influential leaders apply emotional intelligence without realizing they are doing it.

However, whether emotional intelligence is deliberate or intuitive, it strengthens leadership competence when inspiring people to achieve organizational goals.

- CMBOK

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Self-Awareness

- Your ability to:
 - Accurately perceive your emotions in the moment and
 - Understand your tendencies across situations.
- Includes staying on top of your typical reactions to specific:
 - Events,
 - Challenges, and
 - People.

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Self-Awareness

- The more we truly understand our personal beauty and blemishes, the better we are able to achieve our full potential.



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Self-Management (S-M)

- S-M is:
 - What happens when you act—or do not act,
 - Dependent on your Self-Awareness, and
 - Your ability to use your awareness of emotions to stay flexible and direct your behavior positively.



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Historical Emotional Intelligence



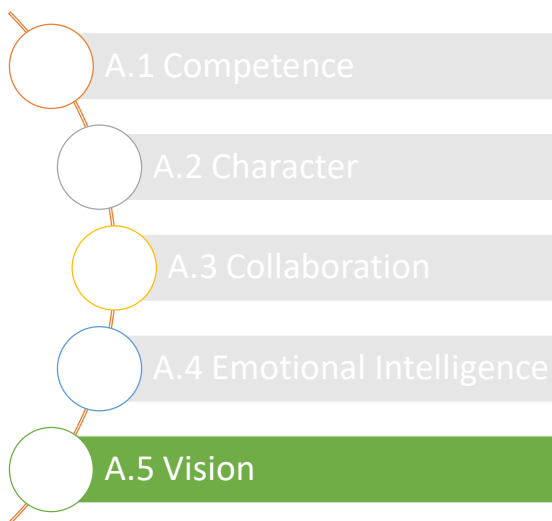
“Educating the mind without educating the heart is no education at all.”

- Aristotle



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A. Leadership



Having vision means being able to see the possibilities of a better future and guiding others on getting there.

For contract managers, vision is required when developing a plan to produce and drive behavior to achieve contract performance and mission success.

- CMBOOK

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Define Success - Then Achieve It



“Begin with the end in mind.”

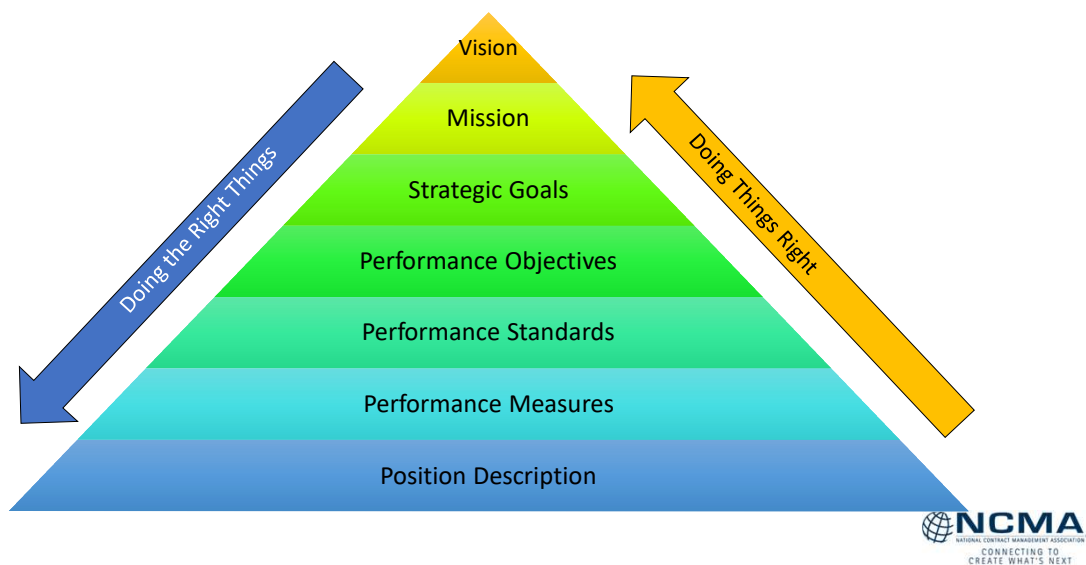
- Dr. Stephen Covey

- The key to success is in defining what success is
- For contract managers, this means:
 - Envision what a successful contract close-out looks like
 - Develop a plan and performance processes to achieve that successful end



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Value of Vision



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What is Leadership?

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 4. Applies *emotional intelligence* (i.e., behavior awareness), and
 5. Inspires *vision* (a clear pathway to success)
 - This gift must be earned—and continue to be earned—by the leader



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People or Mission First?



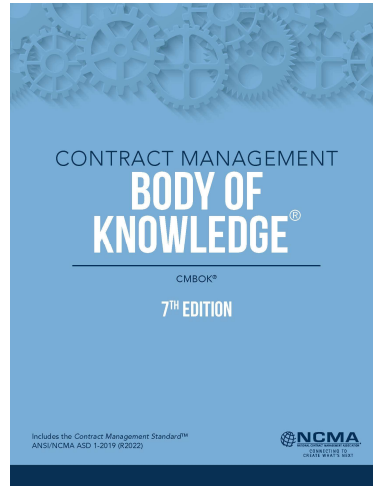
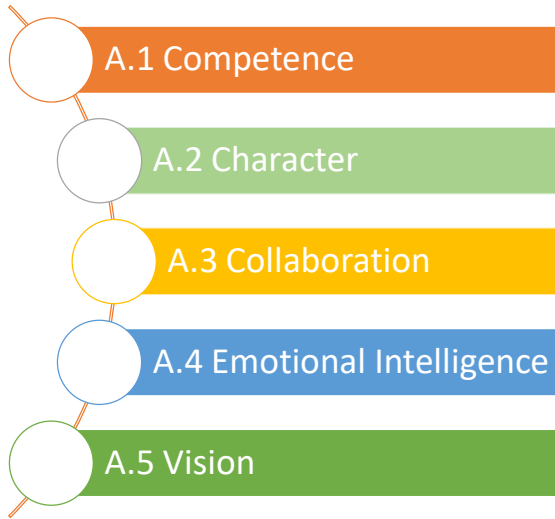
Mission first, people always.

- Anonymous



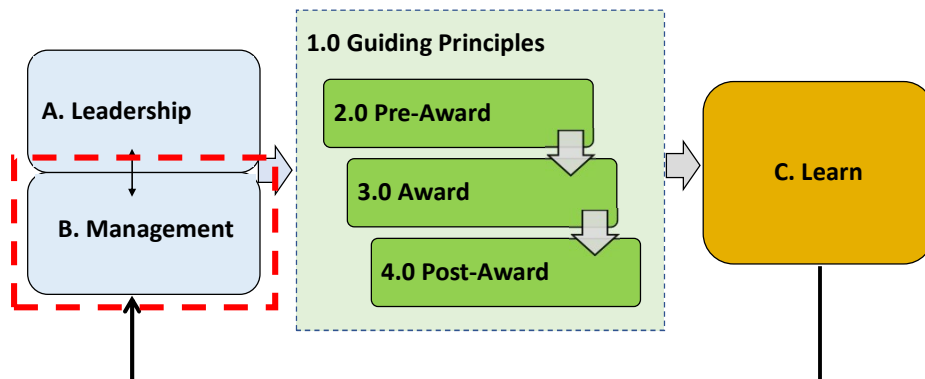
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A. Leadership—Wrap Up



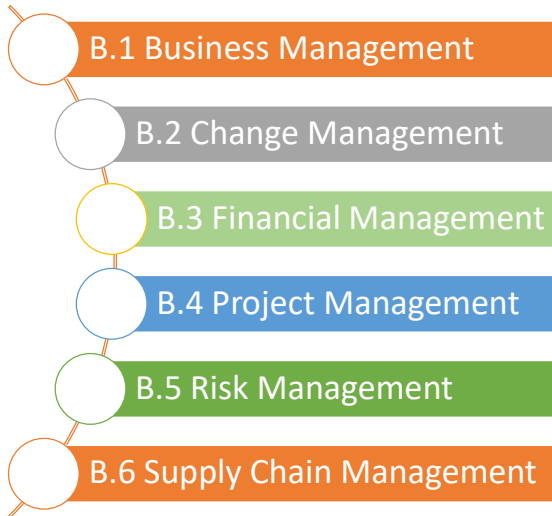
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CMBOK Competency System B. Management



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B. Management



Management competency is important to the performance of contract managers because it consists of the basic functions used to enhance individual competence and organizational capability while accomplishing the organization's contract management goals.

- CMBOK

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B. Management

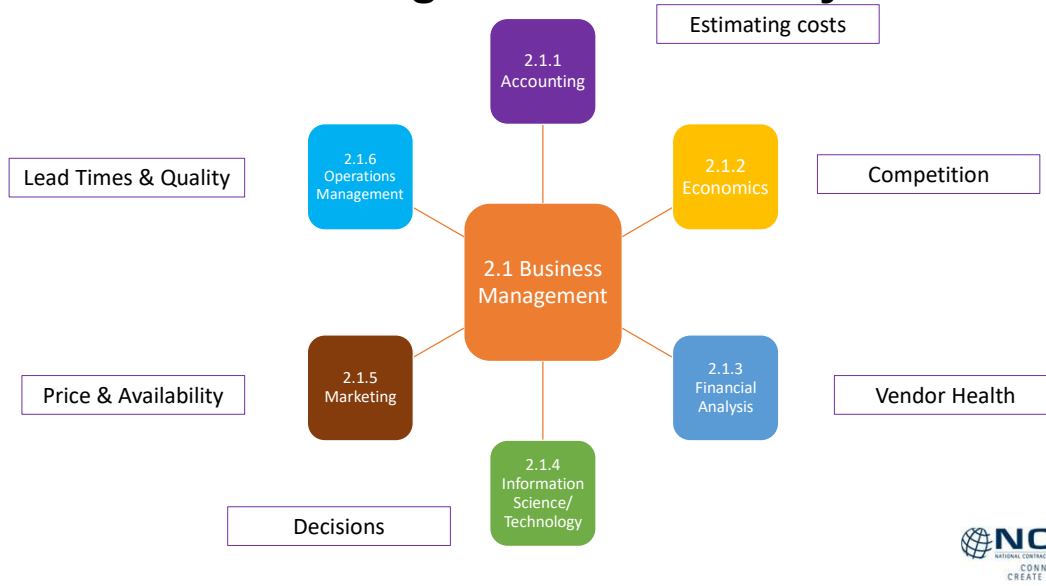


In 2000, W. Gregor Macfarlan predicted that "[t]he success of contracting professionals will be measured by their business management skills, not how many contracts are awarded or changes processed." That prediction has come true.

Today, a contract manager's job is more strategic and team-oriented, requiring technical competency and acquisition skills to meet customer needs.

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B.1 Business Management—Summary



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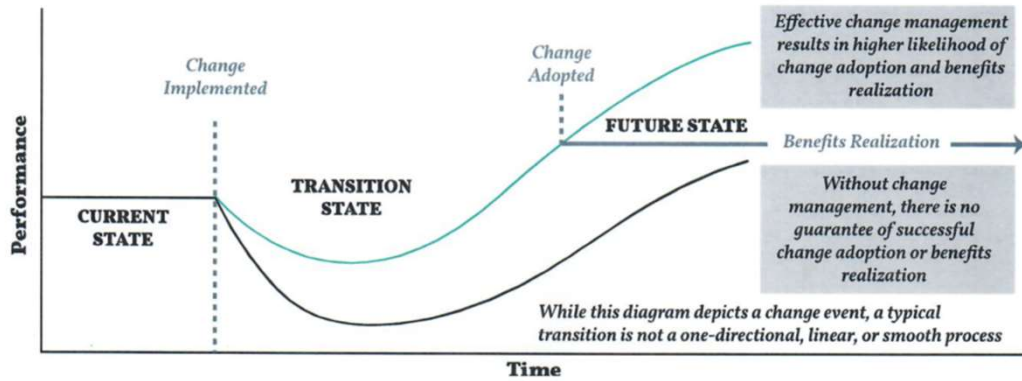
B. Management

- B.1 Business Management
- B.2 Change Management
- B.3 Financial Management
- B.4 Project Management
- B.5 Risk Management
- B.6 Supply Chain Management

Contract managers experience continual changes to processes, people, resources, milestones, etc. and they must be adaptable to changes and recognize when a contract change is required. Successful contract managers understand and apply change management processes to achieve the vision of organizations, stakeholders, and contracts.

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The Effect of Change Management on the Transitional Process



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B.2 Change Management



If you want to make enemies, try to change something.

- Woodrow Wilson
28th US President



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B. Management



Managing contract funds is an essential responsibility of the contract manager, and financial management of the contract is equally important to managing the technical detail.

The *first step* in the financial management process is to develop an estimate of how much funding the contract will require over time.

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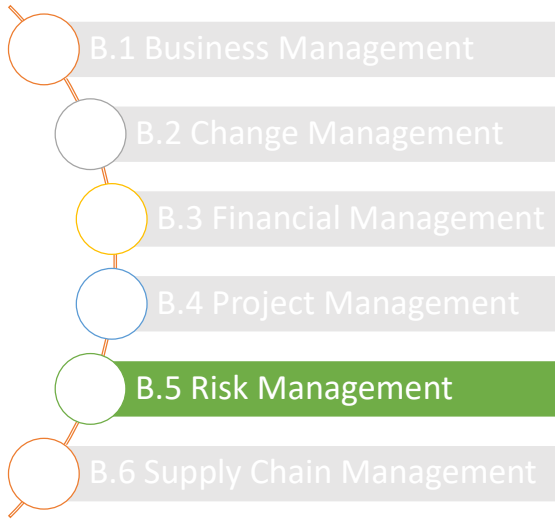
B. Management



Successful contract managers understand how projects are developed and executed, and they understand the relationship between contract managers and project managers throughout the contract life cycle.

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B. Management



Contract management has evolved into a strategic role that interacts with internal and external stakeholders.

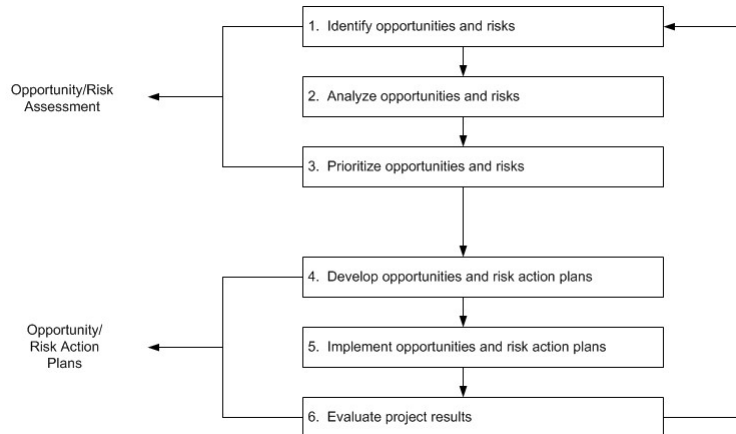
Contract managers are placed on the frontline of being able to determine internal and external risks to contract management and project management.

Understanding how to recognize risks and how to mitigate them is a crucial competency for contract managers.

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B.5 Risk Management

Opportunity/Risk Management (ORM) 6-Step Model



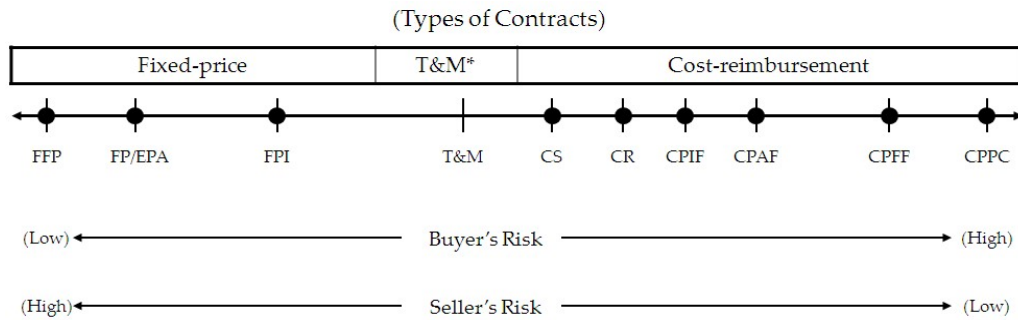
Opportunity/Risk Assessment

Opportunity/Risk Action Plans

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B.5 Risk Management

Risk Sharing through Contract Types



*T&M contracts typically involve higher levels of risk for buyers.



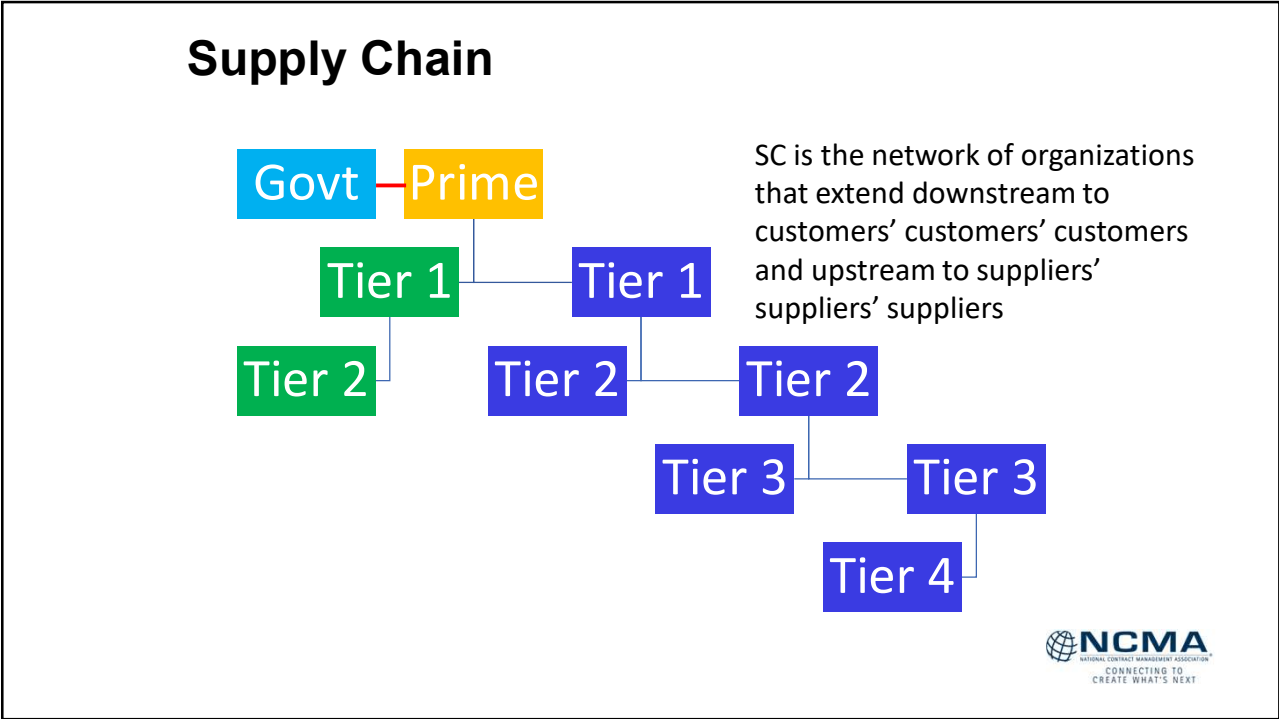
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B. Management

- B.1 Business Management
- B.2 Change Management
- B.3 Financial Management
- B.4 Project Management
- B.5 Risk Management
- B.6 Supply Chain Management**

It is important for contract managers to understand how a requirement—and changes to the requirement—impacts the contractor's ability to effectively manage its supply chain.

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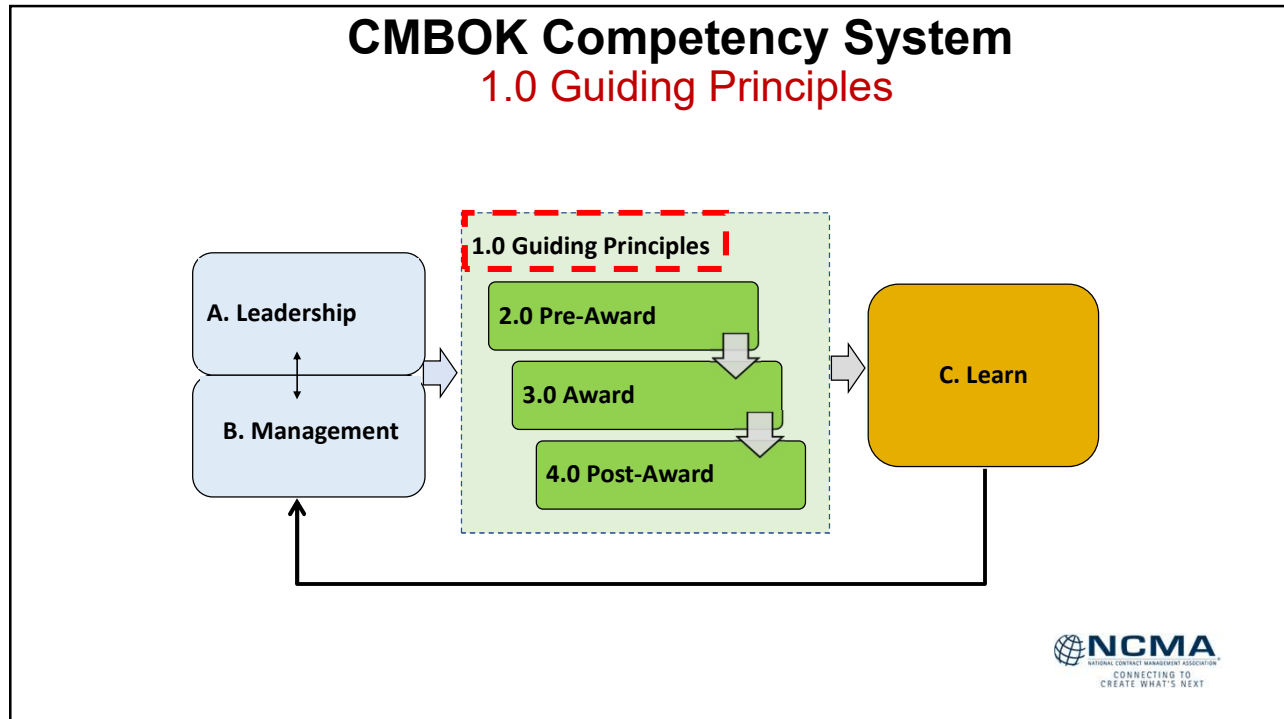


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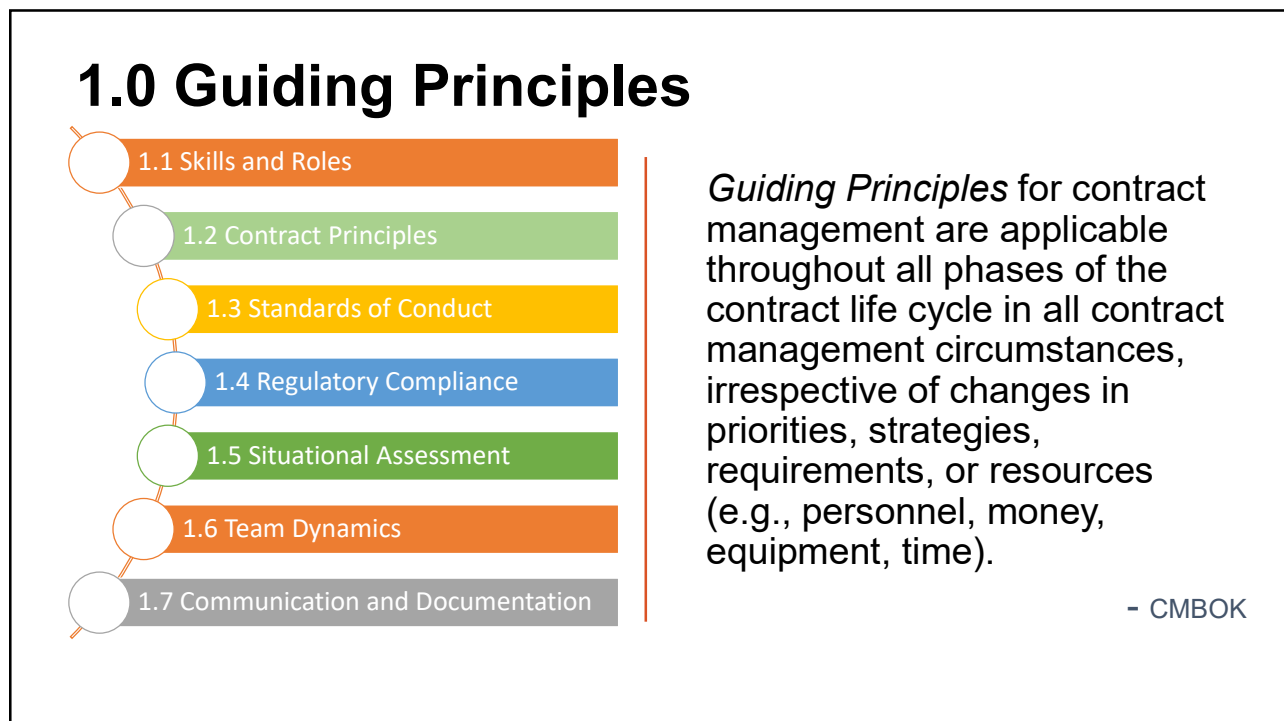
B. Management—Wrap Up

- B.1 Business Management
- B.2 Change Management
- B.3 Financial Management
- B.4 Project Management
- B.5 Risk Management
- B.6 Supply Chain Management

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1.0 Guiding Principles



Contract management is the process of managing contracts throughout the contract life cycle while ensuring customer satisfaction.

There are 2 primary functions—the buyer and the seller.

The buyer and the seller satisfy requirements through effective management of the contract.

- CMBOK

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1.0 Guiding Principles



Contract principles are the fundamentals of contracting that all contract managers must understand and apply. Simply put, a contract results from:

- Offer,
- Acceptance,
- Consideration, and
- The intent to create a legal relationship.

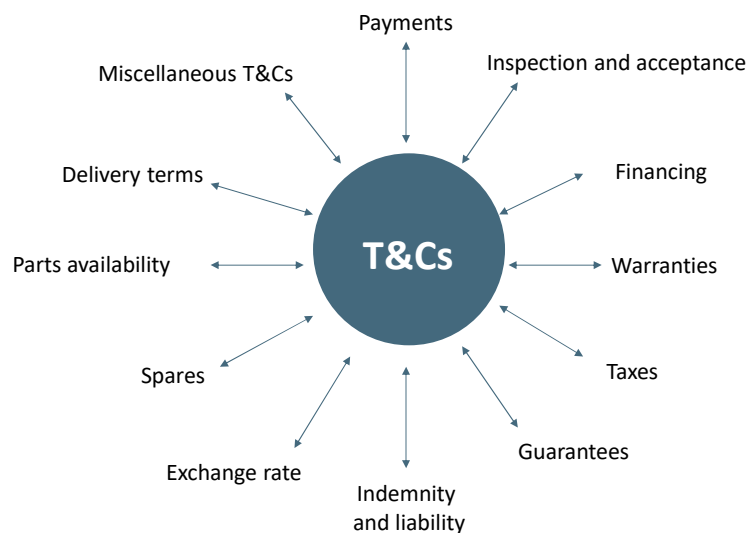
- CMBOK

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1.2 Contract Principles

- Contracts:
 - Define roles and responsibilities,
 - Spell out the conditions under which the work will be done,
 - Define the rights of the parties,
 - Protect the parties, and
 - Provide remedies if one party fails to meet obligations.

Importance of Terms and Conditions



1.0 Guiding Principles



Standards of conduct help to define the ethical behavior expected of all contract managers and their organizations.

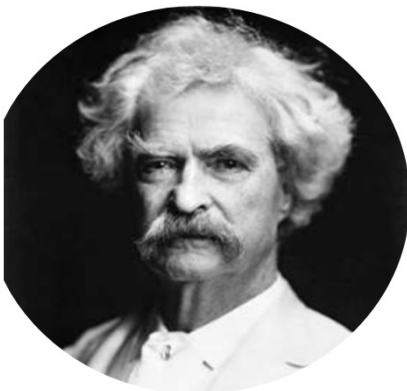
Standards of conduct are intended to create trust and confidence in the integrity of the contract management process.

The standards require contract managers to conduct themselves in such a manner as to bring credit upon the profession.

- CMBOK

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1.3 Standards of Conduct



Always do right—this will gratify some and astonish the rest.

- Mark Twain

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1.0 Guiding Principles



Fundamentally, the contract management profession is about the knowledge and application of laws, codes, and regulations.

It is important for contract managers to have a working knowledge of the laws, codes, regulations, and other sources of guidance that define, to a large extent, the environment in which they operate.

- CMBOK

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1.0 Guiding Principles



A critical business competency that involves being acutely aware of what is occurring in the immediate conditions to understand how information, events, and one's own actions will impact organizational short- and long-term goals and objectives.

- CMBOK

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1.0 Guiding Principles



The contract management team combines the functional disciplines of buyers and sellers for the common purpose of satisfying the customer need.

To be successful, each member must have a working knowledge of all roles involved on the team.

- CMBOK

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1.0 Guiding Principles



Communication between all affected parties must be exchanged and managed early and often to maintain contract management effectiveness.

Contract managers facilitate communication through clearly written documentation that is unambiguous and able to be understood.

- CMBOK

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1.7 Communication & Documentation

Examples of topics to document include, but are not limited to:

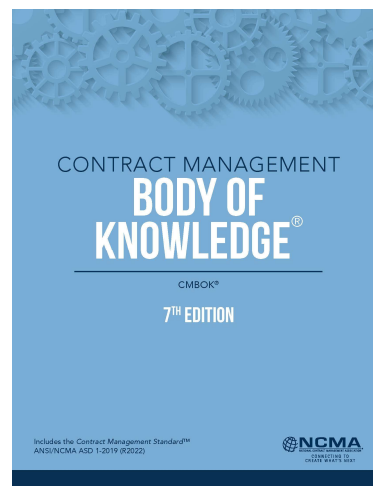
- Contracts and the planning leading to a contract;
- Gestures, conduct, and verbal exchanges;
- Rationale used in decision-making and business judgment;
- Mutually agreed-upon expectations;
- Planned and unplanned events;
- Performance issues and accountability;
- Conflicts and resolutions;
- Changes and solutions;
- Risk management and mitigation;
- Contract compliance and performance quality; and
- Knowledge gained and lessons learned.



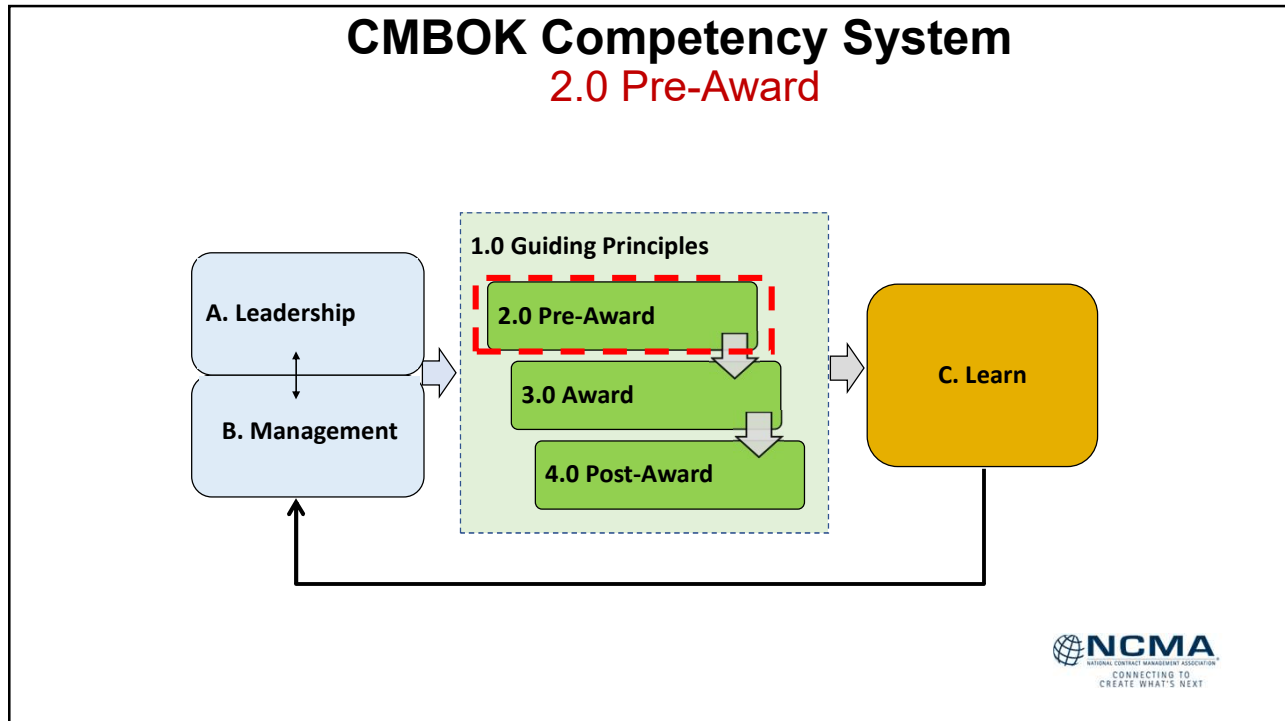
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1.0 Guiding Principles—Wrap Up



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2.0 Pre-Award

- 2.1.1 Plan Solicitation
- 2.1.2 Request Offers
- 2.2.1 Plan Sales
- 2.2.2 Prepare Offer

Pre-Award is the first phase of the contract life cycle. The pre-award process involves contract management functions of “contract planning” and includes the processes for buyers to produce solicitations and sellers to prepare offers.

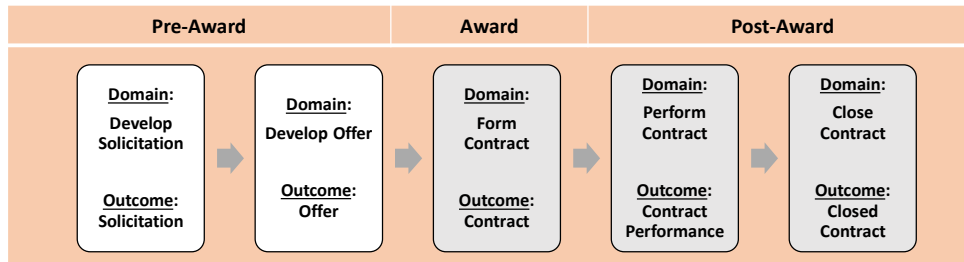
- CMBOK

80

2.0 Pre-Award Life Cycle Phase

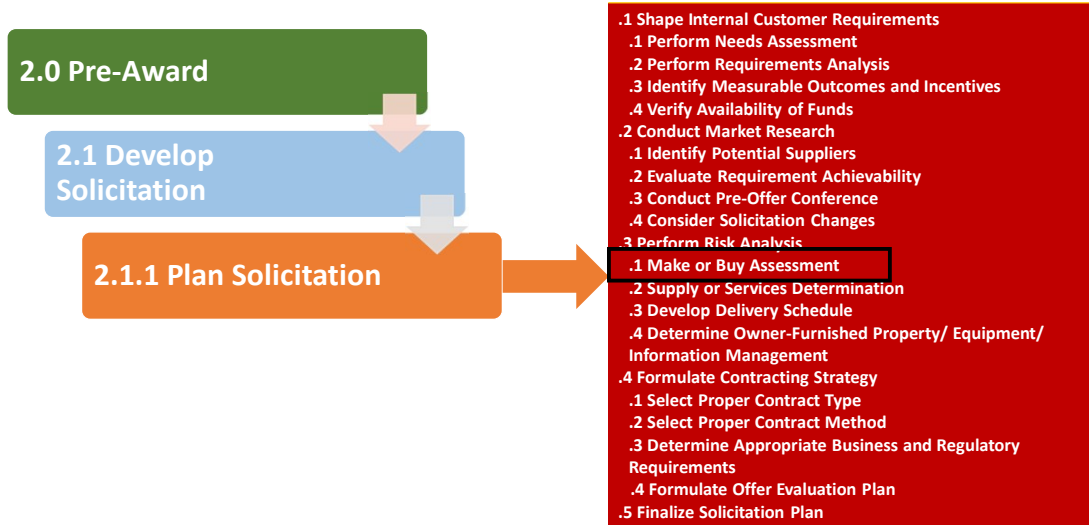
There are two domains within the pre-award life cycle phase:

1. **Develop Solicitation**—The buyer competencies for this domain are “plan solicitation” and “request offers.”
2. **Develop Offer**—The seller competencies for this domain are “plan sales” and “prepare offer.”



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2.1.1 Plan Solicitation—Job Tasks (Buyer)



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Action Office Comparison (Make or Buy)

Action Office	Requirements	Solicitation	Evaluation Criteria	Decision	Performance Review	Oversight	Payment	Termination
Human Resources (make)	Position Description	https://www.usajobs.gov	Evaluation Factors	Hired Person	Performance Plan	Supervisor	Timesheet	Layoff/ Fired/ Retired
Procurement (buy)	Statement of Work	https://sam.gov	Evaluation Factors	Awarded Contract	Quality Assurance Surveillance Plan	Agency	Invoice	T4C/ T4D/ EOC



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Market Research Application

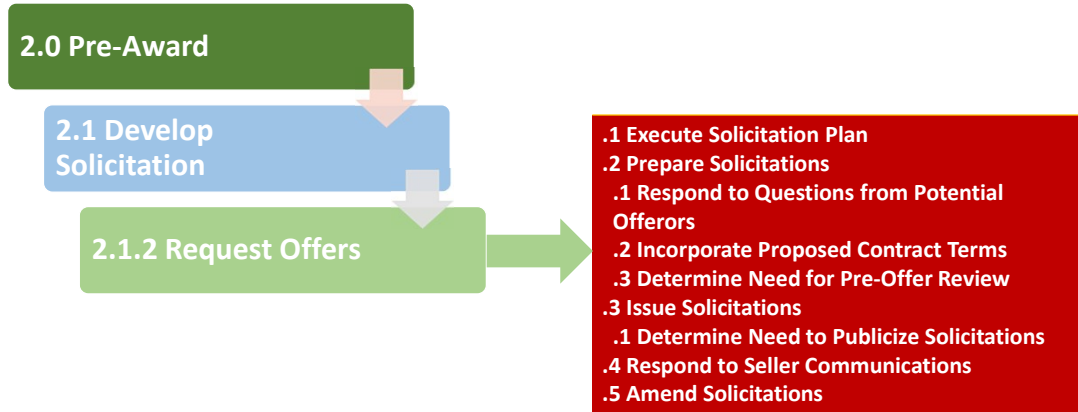


Albert Einstein was visited one day by one of his students. "The questions on this year's exam are the same as last year's!" the young man exclaimed. "Yes," Einstein replied, "but this year all the answers are different."



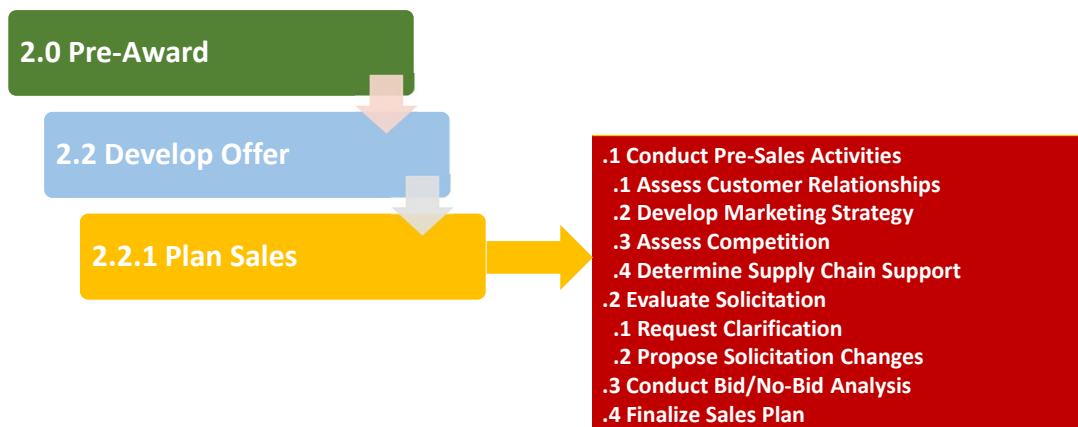
84

2.1.2 Request Offers—Job Tasks (Buyer)



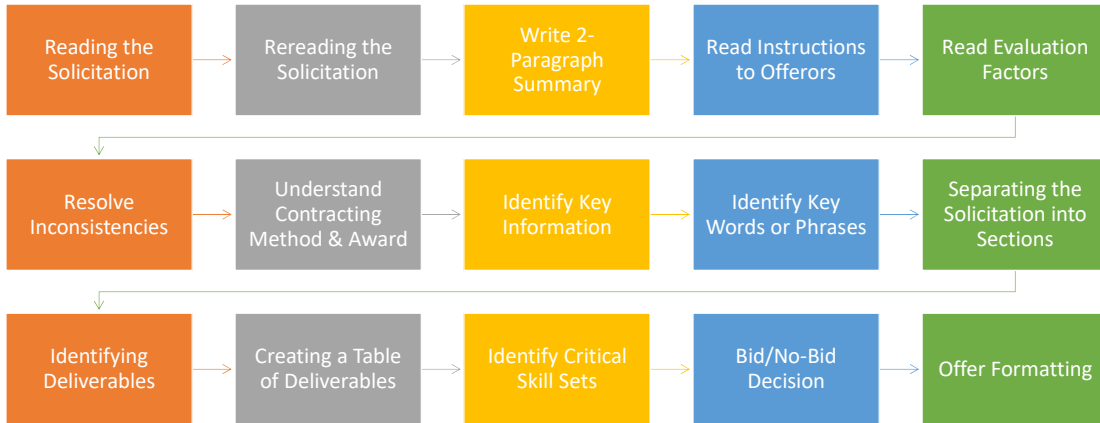
85

2.2.1 Plan Sales—Job Tasks (Seller)



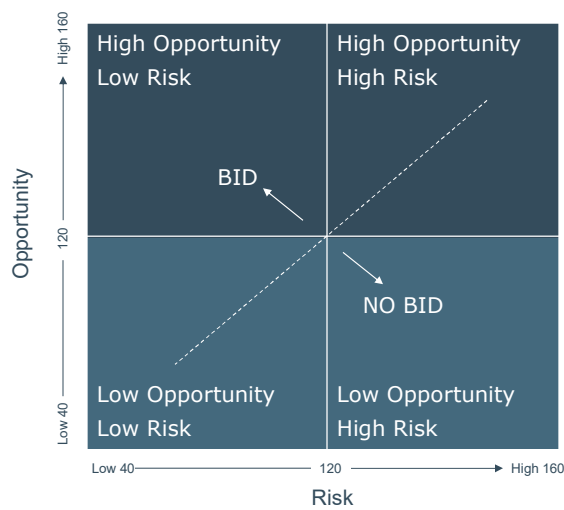
86

.2 Best Practices for Understanding a Solicitation



87

.3 Opportunity–Risk Assessment Grid



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.3 Bid/No Bid Decision

“The specifications were written to clearly give a particular supplier an advantage. Favoritism.”

“The legal terms do not fit present market conditions.”

“There was no opportunity to meet with the agency before or during the RFP process.”

“The timeframe was too just too short for us to be able to adequately respond.”

“The Terms and Conditions were not current or up-to-date.”

“The agency is not open to change; there is no opportunity to educate them about new technologies and/or other possible solutions.”

“The set price requirements within the RFP/IFB were unrealistic.”

Source: NIGP White Paper 2013, “We No Bid & I’ll Tell You Why”

89

2.2.2 Prepare Offer—Job Tasks (Seller)



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Plan & Planning

Everyone has a plan until they get punched in the mouth.



Mike Tyson

Plans are nothing; planning is everything.

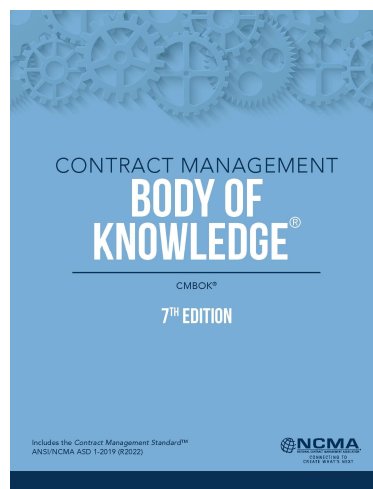


Dwight Eisenhower

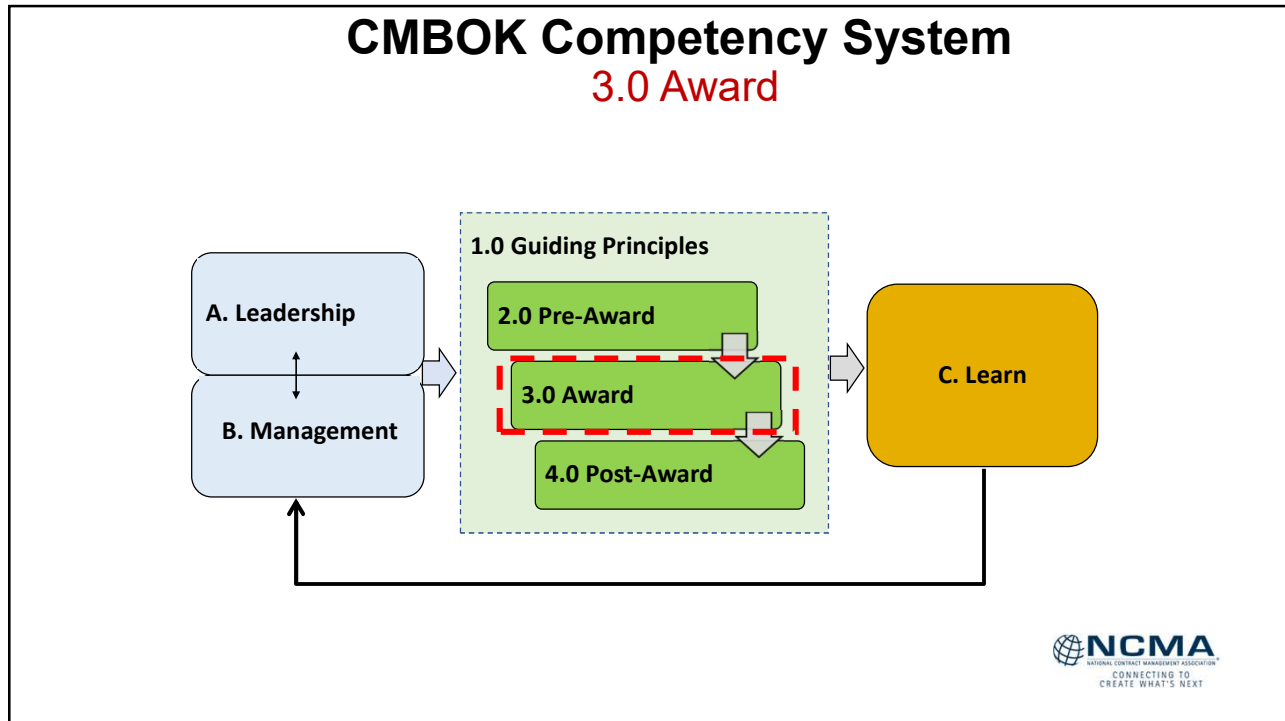


91

2.0 Pre-Award—Wrap Up



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3.0 Award / 3.1 Form Contract

- 3.1.1 Analyze Price or Cost
- 3.1.2 Plan Negotiations
- 3.1.3 Select Source
- 3.1.4 Manage Disagreements

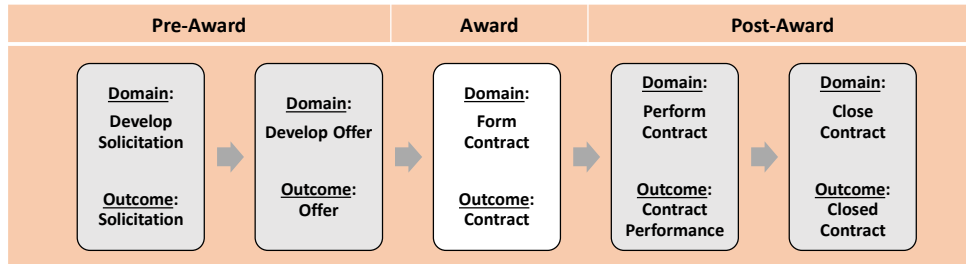
The second contract life cycle phase is *Award*. The award process involves the contract management functions known as “contract formation” and reflects the work by both the buyer and seller that produces the awarded contract.

- CMBOK

94

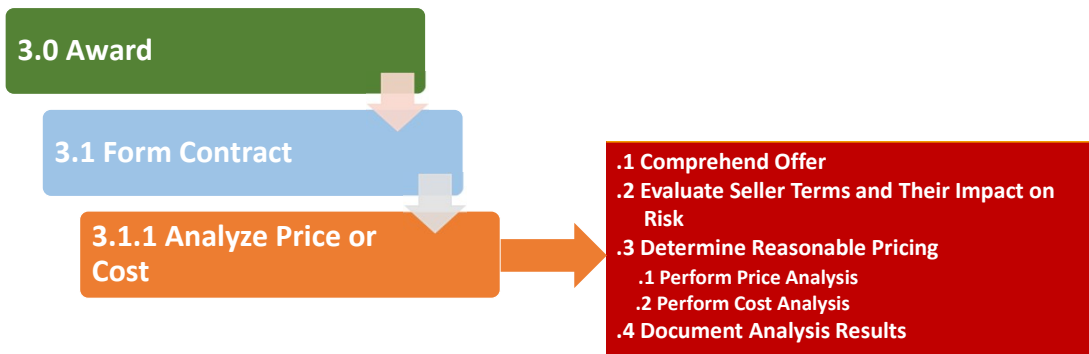
3.0 Award Life Cycle Phase

There is one domain within the award life cycle phase:



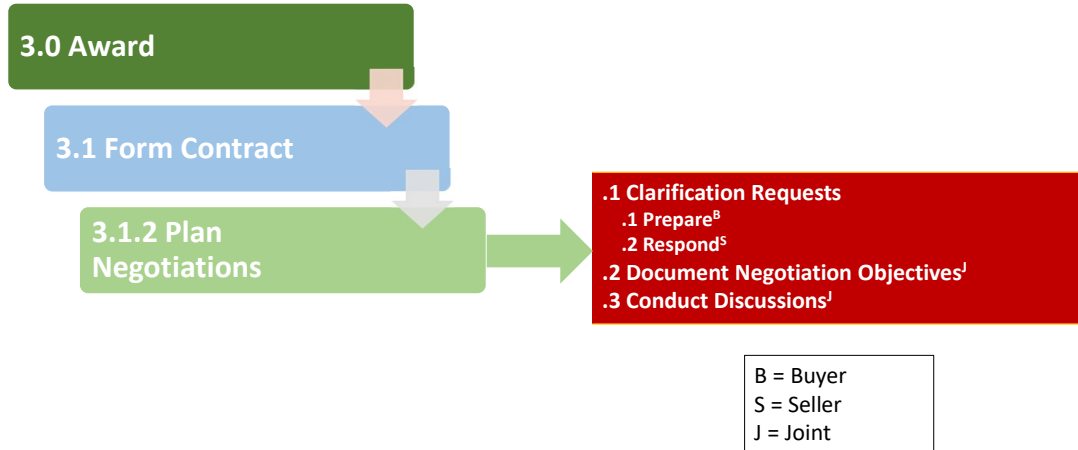
95

3.1.1 Cost or Price Analysis—Buyer Job Tasks



96

3.1.2 Plan Negotiations—Job Tasks



97

Negotiation Best Practice

- Prepare, prepare, prepare
 - Know the opposition's positions better than they do

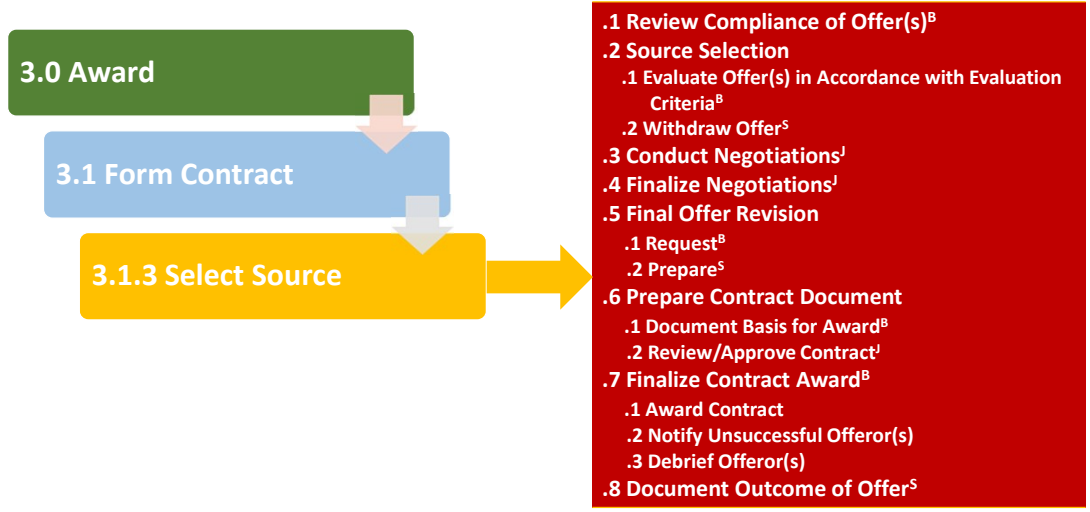
He can take his and beat yours. Then he can take yours and beat his.

- Coach Bum Phillips describing Coach Don Shula



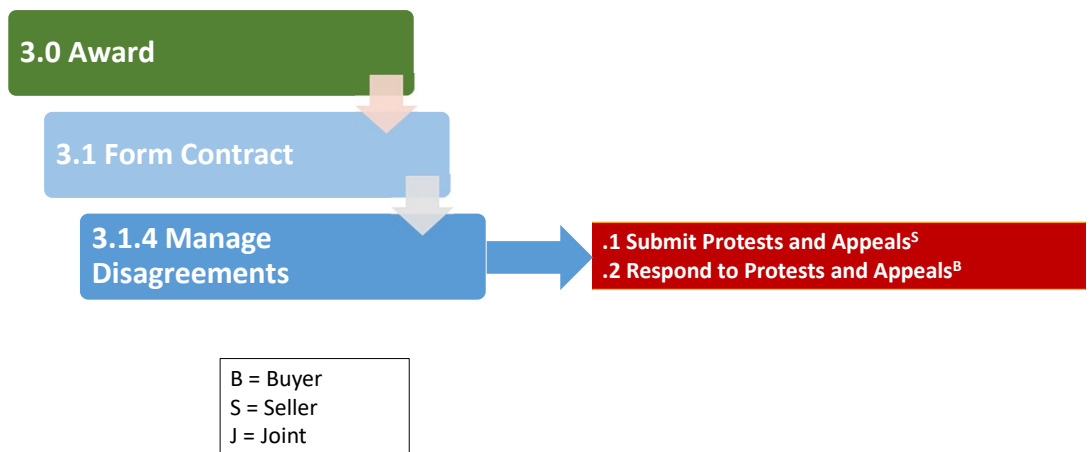
98

3.1.3 Select Source—Job Tasks



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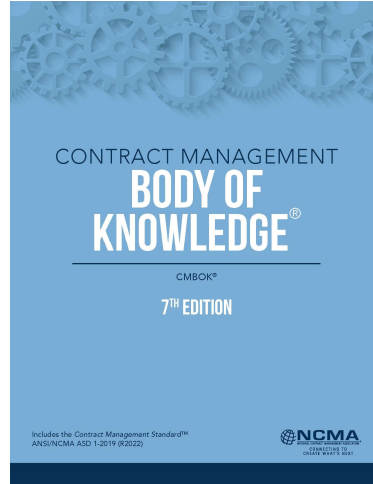
3.1.4 Manage Disagreements—Job Tasks



100

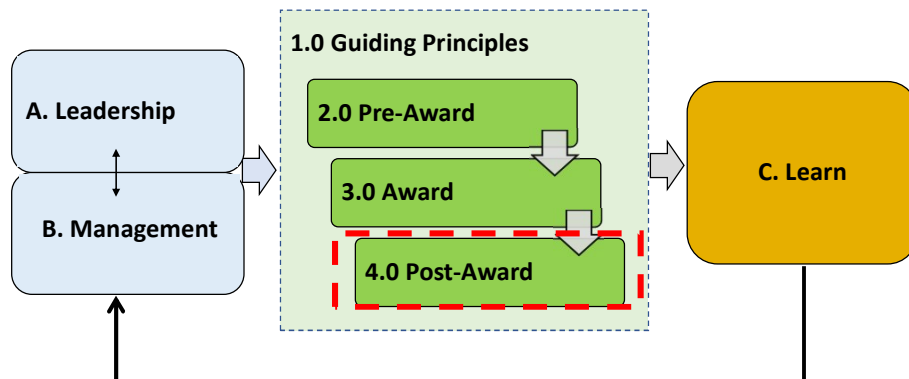
3.0 Award—Wrap Up

- 3.1.1 Price or Cost Analysis
- 3.1.2 Plan Negotiations
- 3.1.3 Select Source
- 3.1.4 Manage Disagreements



101

CMBOK Competency System 4.0 Post-Award



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4.0 Post-Award



Once the award phase is completed, the *post-award* contract life cycle phase begins.

This involves the contract management functions known as “contract administration” and “contract closeout.”

The contract administration functions will vary greatly depending on the complexity of the contract.

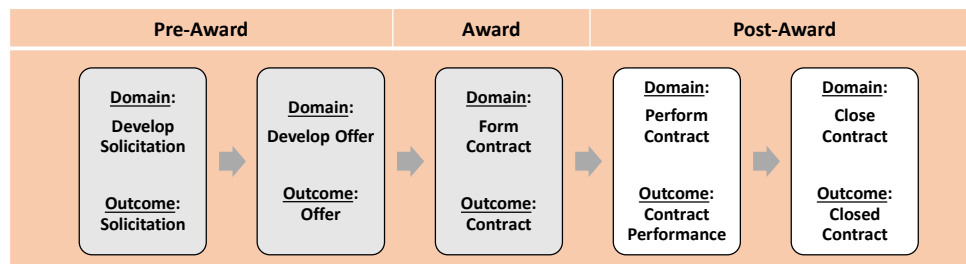
Both the buyer and seller are actively involved in contract administration to ensure satisfactory performance and to bring the contract to a successful conclusion.

- CMBOK

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4.0 Post-Award Life Cycle Phase

There are two domains within the post-award life cycle phase:



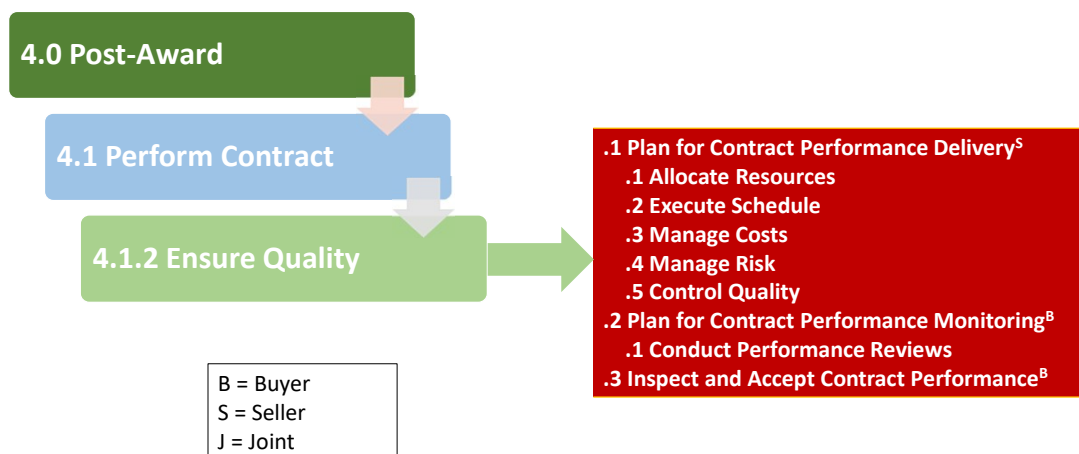
104

4.1.1 Administer Contract—Job Tasks



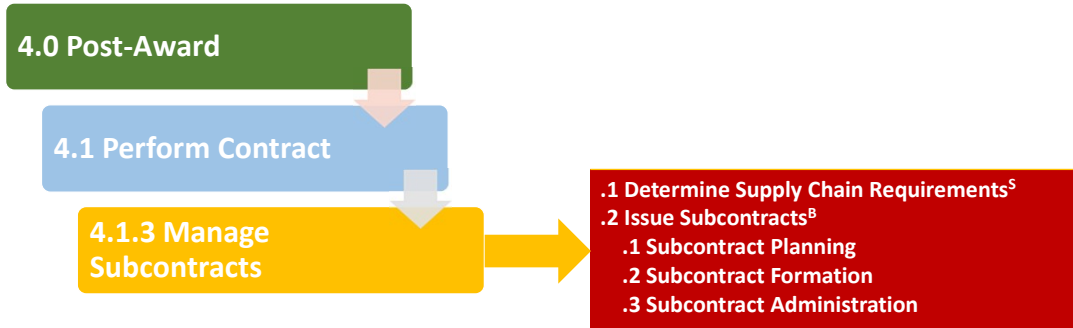
105

4.1.2 Ensure Quality—Job Tasks



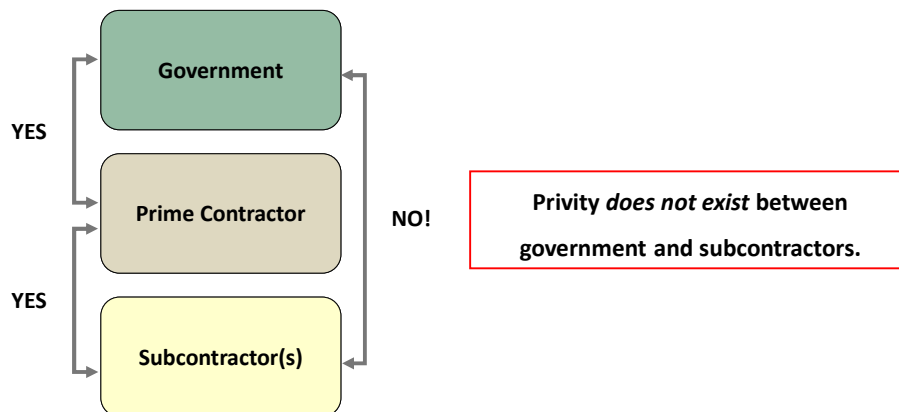
106

4.1.3 Manage Subcontracts—Job Tasks



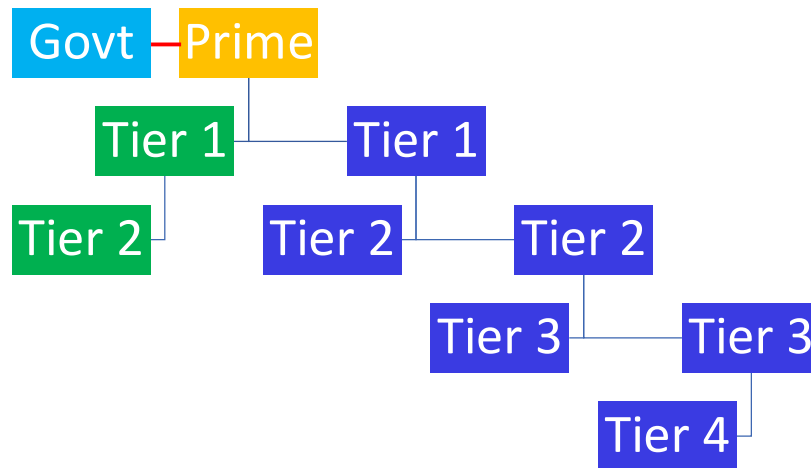
107

Privity = Contractual Relationship



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Privity and Subcontract Management



109

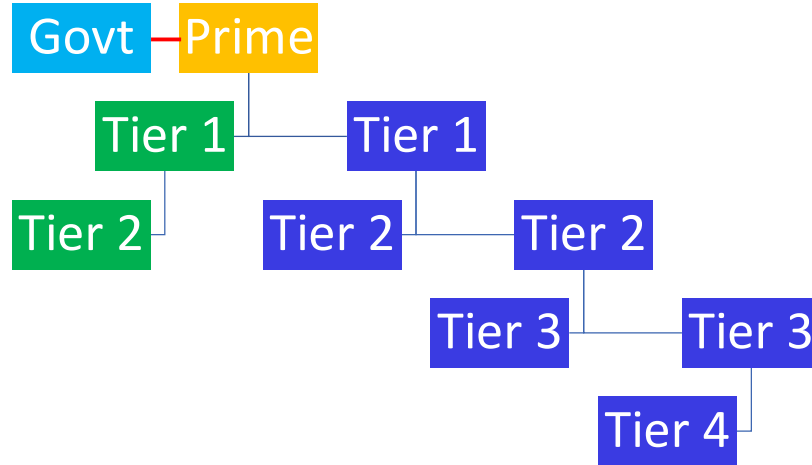
4.1.3 Manage Subcontracts—Flow Down Clauses

- A **flow down** is the transfer and translation of requirements from a prime contract into a subcontract in support of the prime contract.
- Mandatory flow down clauses typically concern the workforce
 - Safety, equal opportunity, drugs & alcohol, whistleblower
- Flow down issues
 - Many prime contractors merely change “government” to “prime” and “prime” to “sub”
 - The sub may unwittingly agree to terms that have nothing to do with its work
 - Some primes forget to flow down a critical clause (eg, T4C)



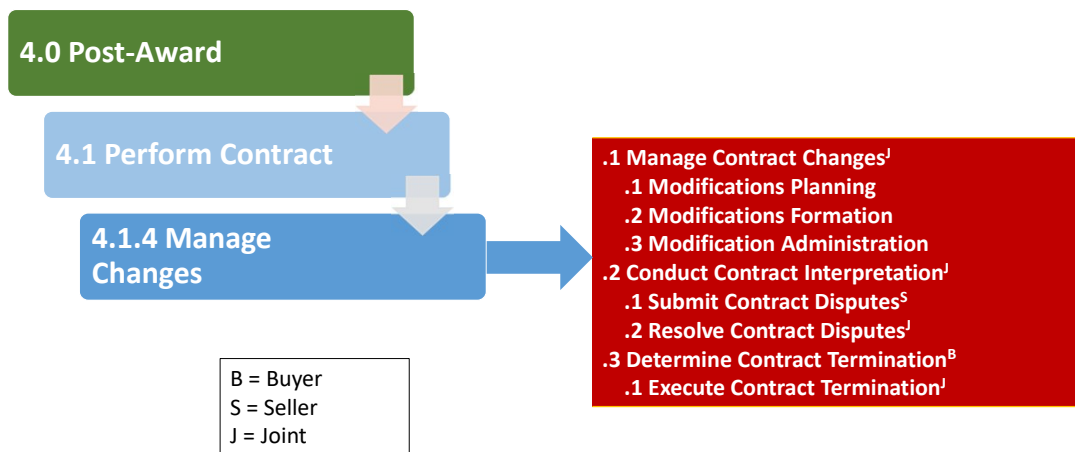
110

Flow Down Clauses

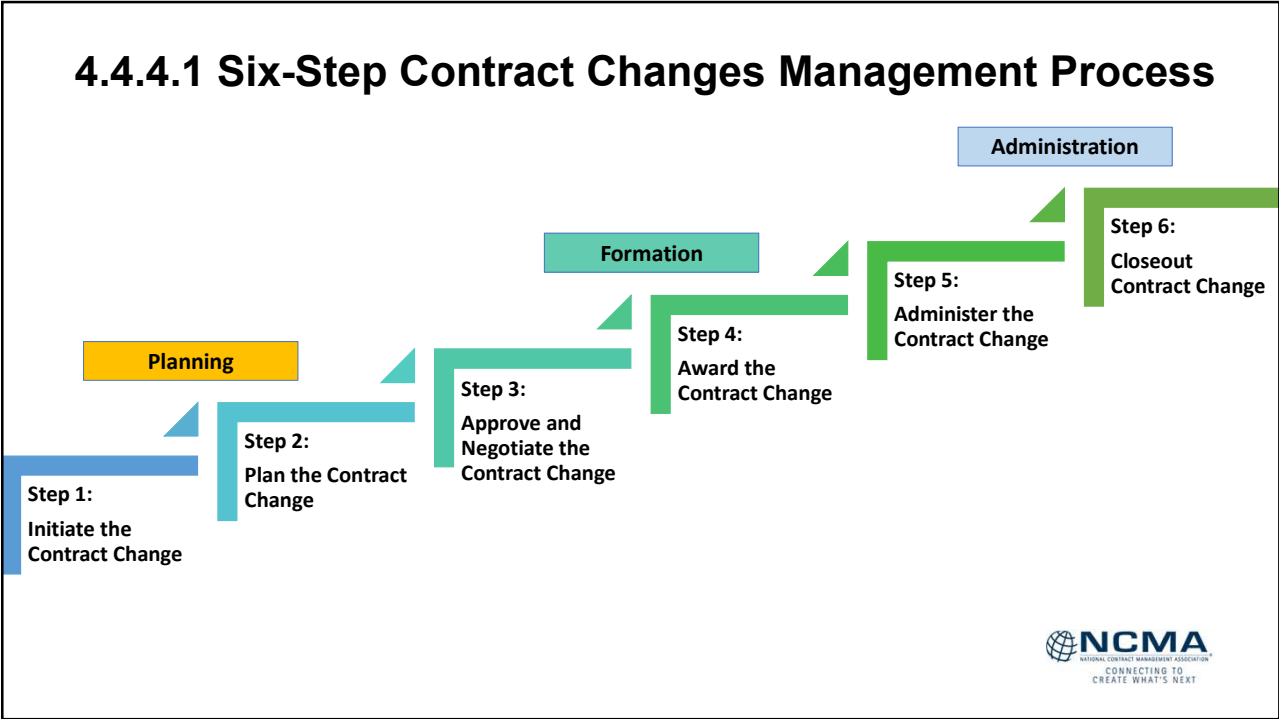


111

4.1.4 Manage Changes—Job Tasks



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4.0 Post-Award / 4.2 Close Contract

- 4.1.1 Administer Contract
- 4.1.2 Ensure Quality
- 4.1.3 Manage Subcontracts
- 4.1.4 Manage Changes
- 4.2.1 Close Out Contract

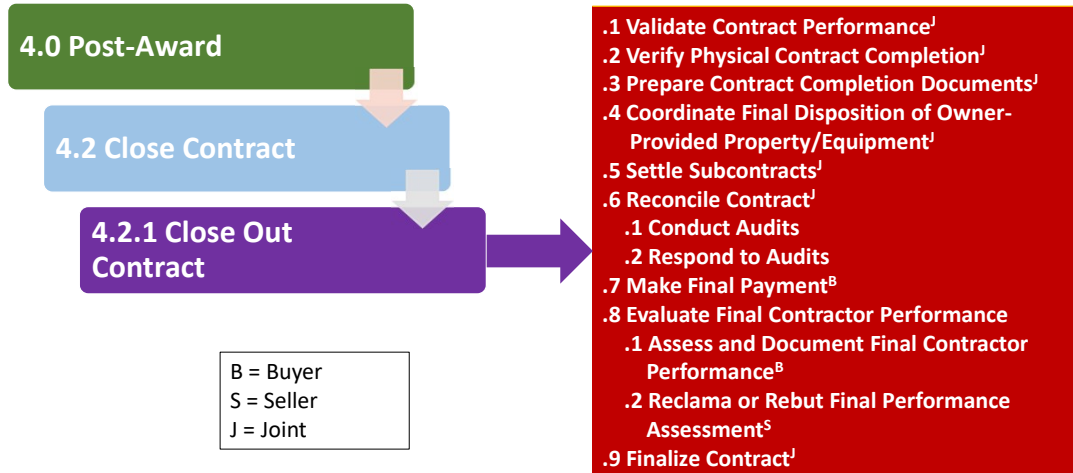
Close Out Contract is the process of ensuring all performance has been accomplished, final contractor performance has been evaluated, final payment has been made, and the contract has been reconciled.

This process involves the completion, delivery, and acceptance of the contract requirement(s) in accordance with the terms and conditions of the contract.

- CMBOK

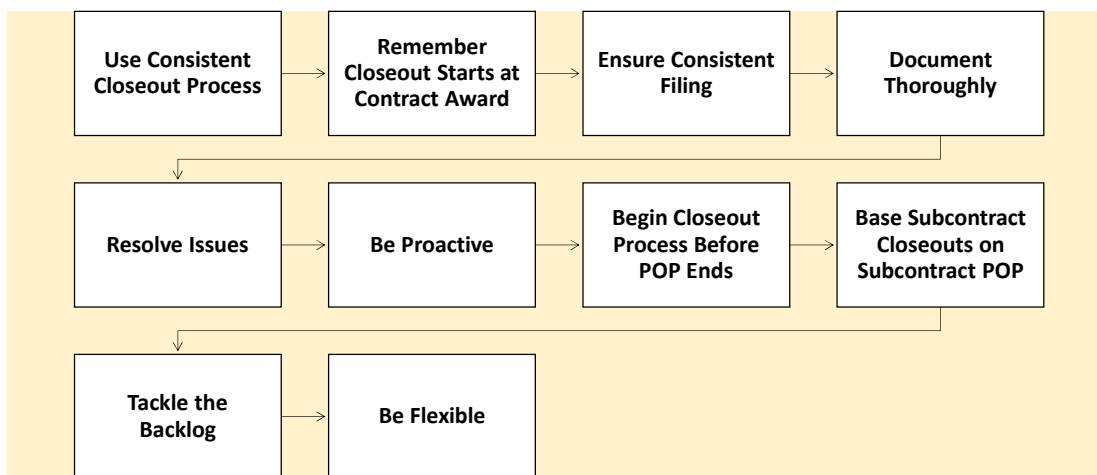
114

4.2.1 Close Out Contract—Job Tasks



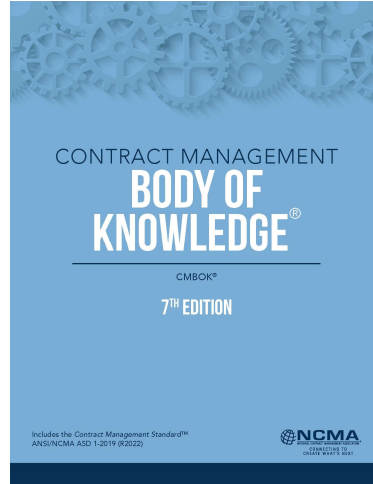
115

Best Practices for Contract Closeout



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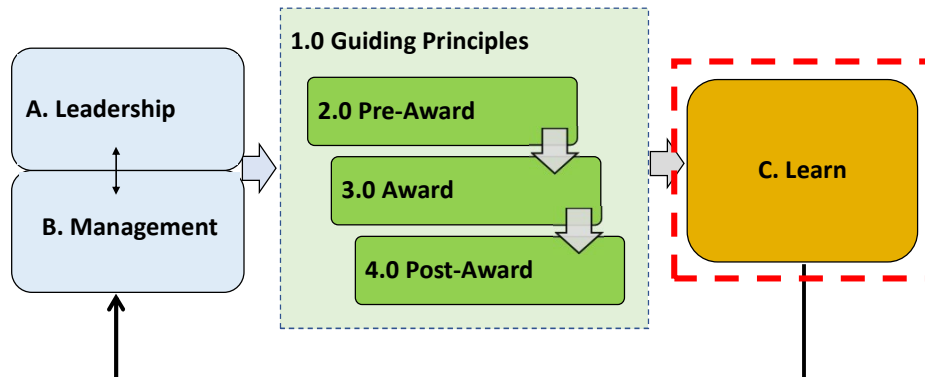
4.0 Post-Award—Wrap Up



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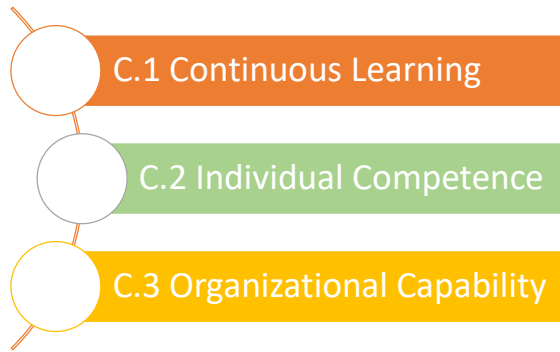
CMBOK Competency System

C. Learn



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C. Learn



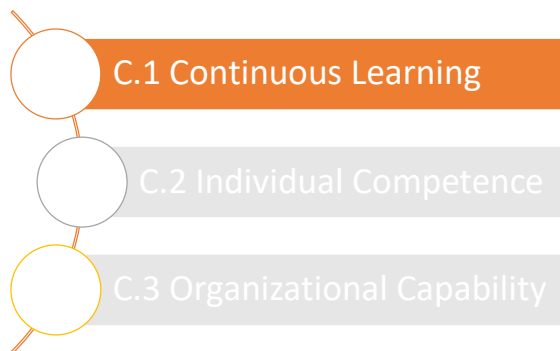
The *Learn* competency is the cornerstone of individual competence and organizational capability. Contract management knowledge can be obtained through educational degrees, training certificates, and professional certification. However, learning is the effective application of knowledge and is measured through strong, sustained performance while driving decisions and achieving meaningful results.

Contract management competence is a direct measurement of the contract manager's ability to apply leadership, management, and technical competencies as a single, integrated process.

- CMBOK

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C. Learn / C.1 Continuous Learning



To excel in work, life, or as a leader, contract managers must commit to continuous learning. Many leaders know this and practice it, but many more miss opportunities for learning that will help them achieve personal and organizational goals.

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C. Learn / C.2 Individual Competence



Individual Competence is developed by applying knowledge, critical thinking, and innovation to business problems, to implement the best solutions.

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C.2.2.1 Needs Assessment

- A needs assessment helps to identify strengths and weaknesses in job performance and knowledge.
 - Can help target education, training, and work experience to build competence.
- Reflective questions to build competence:
 - What competencies do I firmly understand and apply?
 - What competencies do I need to improve?
 - Do I bolster my weaknesses, or do I make my strengths even stronger?
 - How do I improve my competence?

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Getting Started (Novice Learning Goal Example)

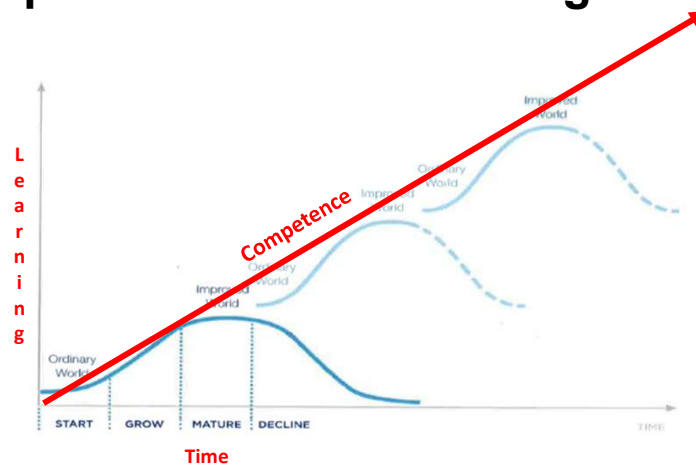
- 1-Year Goal: I will become a better negotiator by accomplishing one additional task related to negotiations each week until January 31, 2025. Ways to get there:
 - Week of Feb 5: **Read** "Getting to Yes"
 - Week of Feb 12: Short **interview** with veteran negotiator
 - Week of Feb 19: **Read** article (CM Magazine, online authors)
 - Week of Feb 26: **Participate** in negotiations (all phases)
 - Week of Mar 4: **Attend** negotiations training (webinar, conference)
- Note: Establish a learning pattern of reading, collaborating, and doing



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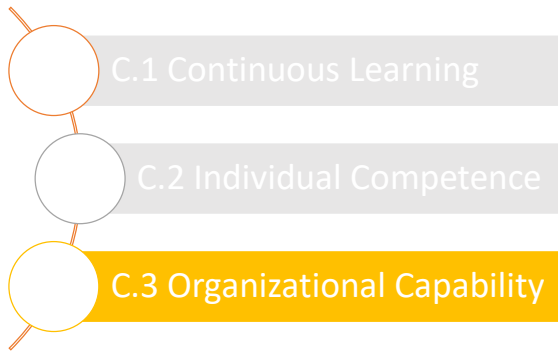
Compound Effect of Learning

Learning =
Training +
Education +
Experience



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C. Learn / C.3 Organizational Capability

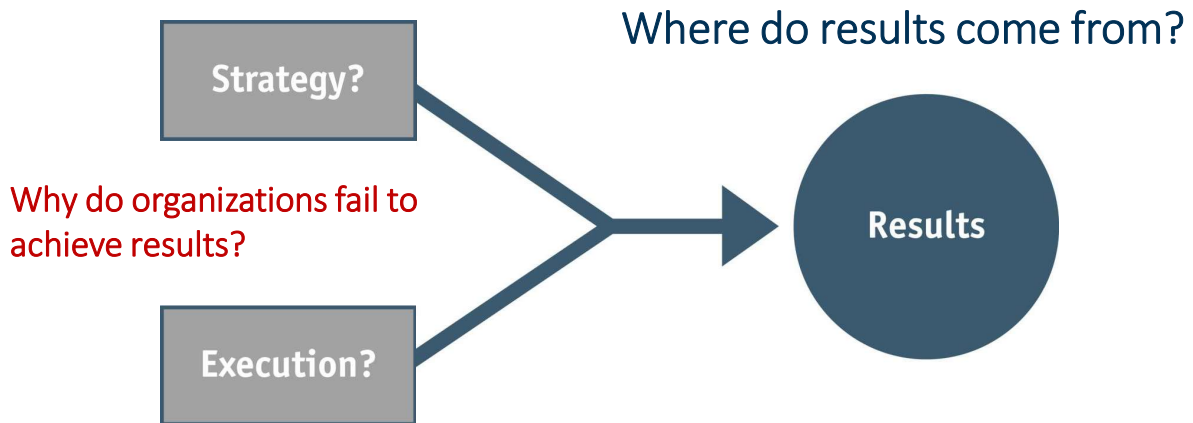


Organizational capability is reflected in the capability of an organization’s contract management processes.

The cumulative effect of the number of competent individuals working within effective processes will produce the level of organizational capability.

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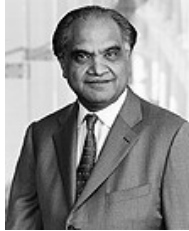
C.3 Organizational Capability—Results



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C.3 Organizational Capability—Results

Why do organizations fail?



It's bad execution. As simple as that: not getting things done, being indecisive, not delivering on commitments.

- Ram Charan, coauthor of Execution: The Discipline of Getting Things Done

You are perfectly aligned to receive the results you are now getting.

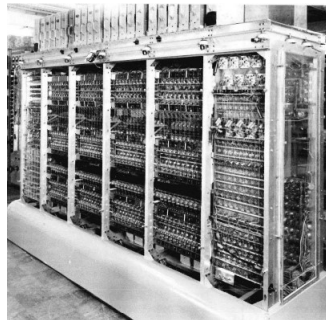
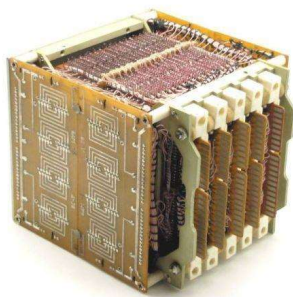
- Dr. Stephen R. Covey



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Lesson Learned of Being the Go-To Guy/Gal

Core Memory



Vacuum Tubes

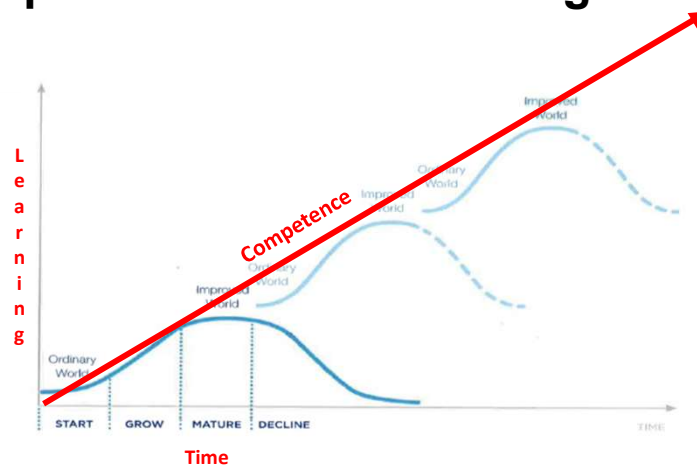


Lesson Learned: Develop other Go-To'ers

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Compound Effect of Learning

Learning =
Training +
Education +
Experience



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NATIONAL CONTRACT MANAGEMENT ASSOCIATION
CONNECTING TO
CREATE WHAT'S NEXT

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Getting Started (Go-To Learning Goal Example)

- 1-Year Goal: I will become the go-to negotiator by accomplishing one additional task related to negotiations each week until January 31, 2025.
Ways to get there:
 - Week of Feb 5: **Read** "Getting to Yes" again
 - Week of Feb 12: Participate in short **interview** with novice negotiator
 - Week of Feb 19: **Write** article (CM Magazine, LinkedIn)
 - Week of Feb 26: **Conduct** negotiations (all phases)
 - Week of Mar 4: **Develop and deliver** negotiations training (webinar, conference)
- Note: Establish a learning pattern of writing, reading, collaborating, doing, and making others look like heroes.

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CREATE WHAT'S NEXT

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Reaching the Go-To Status—How do you know?

1. You don't deliver expected results—you exceed them. You over deliver. You WOW!
2. You don't wait to be assigned—you take the initiative.
3. You focus on what's vital and don't get distracted by immediately saying yes to all meetings, answering all emails, or responding to all communication.
4. You not only work to improve your role and area of responsibility, you proactively develop a working knowledge of other roles and areas of responsibility that impact your team's productivity.
5. You don't settle for being good at many things. You're working on your superpower/specialized skill.
6. You don't only engage in the training provided by your boss, you seek professional development opportunities outside your organization.



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CMS Affiliated Credential: *Certified Contract Management Associate*



Section	# Questions
Introduction	8 – 12
1.0 Guiding Principles	15 – 22
2.0 Pre-Award	15 – 22
3.0 Award	15 – 22
4.0 Post-Award	15 – 22
TOTAL	90

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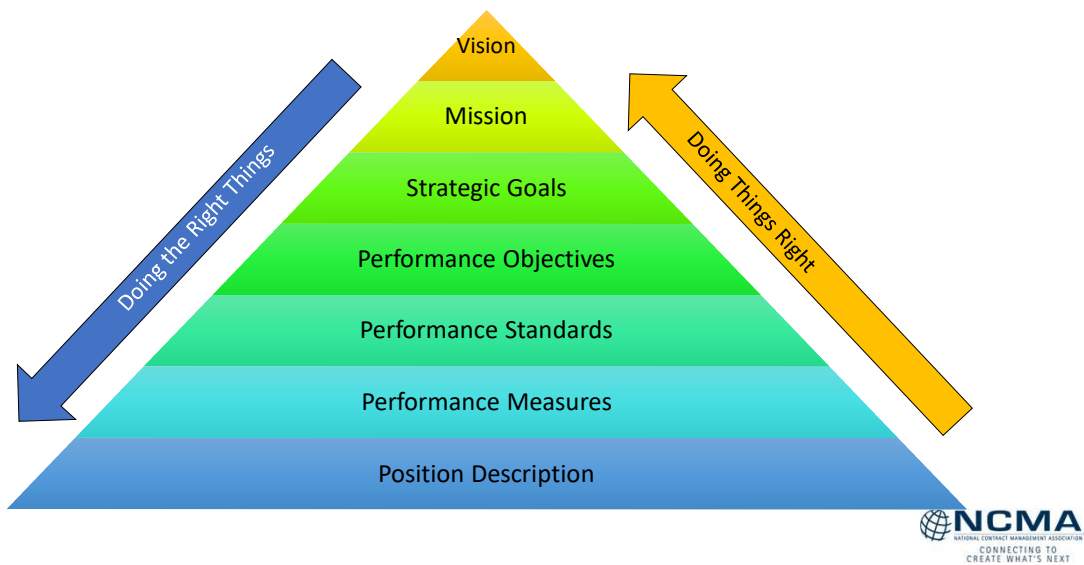
CMBOK Affiliated Credential: *Certified Professional Contract Manager*



Section	# Questions
CM Framework	5-8
CMBOK® Overview	5-8
A. Leadership	8-12
B. Management	30-35
1.0 Guiding Principles	30-35
2.0 Pre-Award	30-35
3.0 Award	30-35
4.0 Post-Award	30-35
C. Learn	6-10
TOTAL	180

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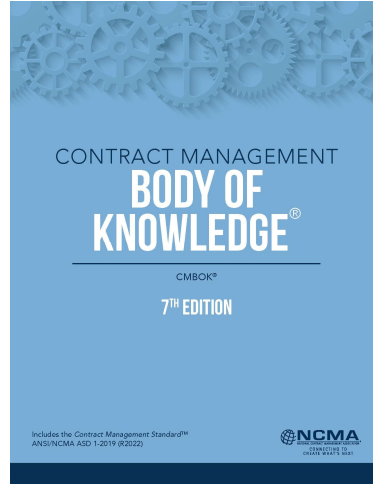
Value of Vision



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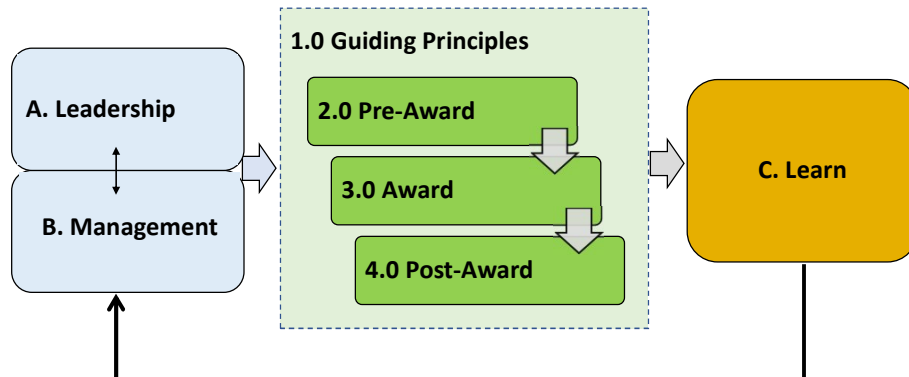
C.0 Learn—Wrap Up

- C.1 Continuous Learning
- C.2 Individual Competence
- C.3 Organizational Capability



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CMBOK Competency System



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Questions?



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jwilkinson@thinc-llc.com
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