Course #430 Syllabus
WEBCAST-Grant Management Boot Camp
(Covers 12 Grant Management Modules)

This Boot Camp bundle includes **12 Grants Management training courses** including **8 modules on the Administrative Requirements** and **4 modules on Cost Principles.** These modules explain the revised Federal grants administration regulations now contained in 2 CFR, Part 200 effective December 23, 2013. The new regulations supersede and streamline the guidance formerly contained in OMB Circulars A-21, A-87, A-110, A-122, A-89, A-102, A-133, and A-50 (Single Audit Act).

Course Audience: For Current and Potential Federal Award Recipients

Course Length: 12 Contact Hours presented over 2 days

The first section covers Administrative Requirements:

Building Your Foundation: Administrative Requirements Boot Camp
(Modules 1-8: Administrative Requirements for Non-Federal Entities)

These lessons run a gamut of topics, because there's a lot to cover. Once you've completed the 8 Administrative Requirements lessons, you'll have a solid foundation of what is needed to manage your current Grant and future Grants.

Course Description: This Boot Camp bundle includes all 8 Administrative Requirements training courses on the Uniform Administrative Requirements contained in 2 CFR, Part 200, Subparts A thru D (formerly 2 CFR Part 215 and OMB Circular A-110).

1) Course 4010 **Getting Started with Federal Awards**
2) Course 4020 **Pre-Federal Award Requirements**
3) Course 4030 **Monitoring and Reporting**
4) Course 4040 **Payment Management**
5) Course 4050 **Other Financial and Program Topics**
6) Course 4060 **Property Standards**
7) Course 4070 **Procurement Standards**
8) Course 4080 **Closeout of Federal Award**

Learning Objectives:

Specific learning objectives can be reviewed on the full course description of the individual courses contained below. The Boot Camp bundle for the Uniform Administrative Requirements includes the following topics

Administrative Requirements:

1) Overview of the purpose of the Uniform Administrative Requirements for Federal award recipients and related "getting started" topics.
2) Main areas related to Pre-Federal Award Requirements for Federal award recipients.
3) The first of three courses covering Financial and Program topics. This course looks at Monitoring and Reporting, including internal control requirements.
4) The second of three courses covering Financial and Program topics. This course looks at Payment Management, including advance vs. reimbursement methods.
5) The third of three courses on Financial and Program Management topics. This course expands on other Financial and Program Management topics, including changes to program budgets and audit requirements.
6) The Property Standards required for Federal award recipients, including title, care and use, and disposal of property.
7) Procurement Standards including requirements for written procedures, competition and contracts.
8) Requirements for closing out Federal awards, including record retention and subsequent adjustments.

The next section covers Cost Principles:

The Art of Spending Wisely: Cost Principles Boot Camp
(Modules 1-4: Cost Principles for Non-Federal Entities)

> *This is the section that delves deeply into how Federal award funds can be spent-or not spent as well as what are the correct "buckets" to put costs into. You'll build on the basic criteria as well as look at a wide range of allowable and unallowable costs.*

Here's what we cover:

Course Description: This Boot Camp bundle includes all 4 courses on Cost Principles contained in 2 CFR, Part 200, Subparts E-F (formerly 2 CFR, Part 230 and OMB Circular A-122).

1) Course 4110 **Cost Principles for Direct Costs**
2) Course 4120 **Cost Principles for Indirect (F&A) Costs**

3) Course 4130 **Selected Items of Allowable Cost Principles**
4) Course 4140 **Selected Items of Unallowable Cost Principles**

Learning Objectives:

Specific learning objectives can be reviewed on the full course description of the individual courses contained below. The Boot Camp bundle for Cost Principles includes the following topics:

Cost Principles

1) Fundamentals and examples of direct costs
2) Fundamentals and examples of indirect costs
3) Fundamentals and examples of allowable costs
4) Fundamentals and examples of unallowable costs

Here's how the courses work:

- The live WEBCAST instructor-led grant management training includes a **comprehensive presentation, training notes and study guides files available online to registered participants.**
- The 12 contact hours are spread over 2 days beginning at 9:0 AM and wrapping up at 4 PM. on day one and day two. Periodic breaks are taken along with a lunch break from noon-1 PM.
- Replay access to the WEBCAST to watch at your convenience is also available after the presentation is completed.
- You'll also receive a variety of online resources including our topical **Quick References Guides**. (These are also great for review, since you can skim them quickly to find the major points on a variety of Grants Management topics.)
- PLUS-you'll have a **full year to** access your personal e-mentor with questions about the training materials and applying them to your grant management work.

Questions? Contact us at Support@MyFedTrainer.com

Individual Module Descriptions:

Course #4010 Syllabus
<u>Getting Started with Federal Awards</u>
(Module 1: Administrative Requirements for Non-Federal Entities)

> *How does the Federal award process work? Which regulations do we have to follow? What are the roles and responsibilities for Federal awards? And who is responsible for subrecipients?*

Here's what we cover:

This Grants Management Boot Camp training course covers four main areas related to general roles and responsibilities for Federal award recipients:

1) The purpose of the regulations.
2) The applicability of the regulations to specific organizations.
3) The roles and responsibilities of the Office of Management and Budget, Federal awarding agencies, and Federal award recipients.
4) The responsibilities related to subrecipients.

Learning Objectives:

At the end of this course, you should know and understand the following learning objectives:

1) The purpose of the Uniform Administrative Requirements.
2) The main organizations involved with the Uniform Administrative Requirements.
3) The Federal administrative requirements your organization is subject to.
4) The roles and responsibilities of the OMB, Federal awarding agencies, and Federal award recipients.
5) The relationship between the prime recipient and subrecipients of Federal awards.

Course #4020 Syllabus
<u>Pre-Federal Award Requirements</u>
(Module 2: Administrative Requirements for Non-Federal Entities)

> *What are the different types of Federal awards? Why do I need to worry about suspension and debarment? What do I need to know about special Award conditions? What are examples of compliance issues and contract provisions for our grants?*

Here's what we cover:

This Grants Management Boot Camp course covers four main areas related to pre-Federal award requirements for recipients of Federal awards:

1) The types of award instruments.
2) The requirements related to suspension and debarment conditions.

3) Other compliance and special conditions requirements in the Uniform Administrative Requirements.

4) Other contract provisions contained in Appendix III of the Uniform Administrative Requirements.

Learning Objectives:

At the end of this course, you should know and understand the following learning objectives:

1) List the three main types of Federal awards

2) Distinguish between the main types of Federal awards.

3) Describe the suspension and debarment requirements.

4) Identify other types of special conditions and contract provisions that your organization may be subject to.

Course #4030 Syllabus
Monitoring and Reporting
(Module 3: Administrative Requirements for Non-Federal Entities)

The first of three modules covering Financial and Program Management. What is required for a financial management system? Why do I need to worry about internal controls? What documentation do I need to keep? Do I need written procedures?

Here's what we cover:

This is the first of three Grants Management Boot Camp training courses covering Financial and Program Management topics. This course looks at Monitoring and Reporting, specifically:

1) Reporting requirements.

2) Guidelines for internal control.

3) Standards for documentation of spending.

4) Specific written procedures that your organization must maintain.

Learning Objectives:

At the end of this course, you should know and understand the following learning objectives:

1) List the reporting requirements of a financial management system.

2) Identify components of an effective control system.

3) Compare and contrast examples of acceptable documentation with examples of insufficient documentation.

4) Describe the requirements for written procedures contained in the financial management system requirements.

Course #4040 Syllabus

Payment Management

(Module 4: Administrative Requirements for Non-Federal Entities)

The second of three modules covering Financial and Program Management. How do we get our grant funds? Are there limits on how much we can get? And when we can get it? What are the cash management rules for grant funds we must follow?

Here's what we cover:

This is the second of three Grants Management Boot Camp training courses covering Financial and Program Management topics. This course looks at Payment Management, specifically:

1) Control requirements related to the payment management standards.

2) Payment methods that are used by agencies to remit funds.

3) Types of payments that may be included in cash requests to your funding agency.

4) Requirements for the types of accounts where funds can be placed.

Learning Objectives:

At the end of this course, you should know and understand the following learning objectives:

1) Describe the control requirements for payment management.

2) Contrast the 2 types of payment methods for obtaining Federal funds.

3) Identify the types of items that may be included in payment requests from the funding agency.

4) List the requirements to receive advanced funds from Federal agencies.

Course #4050 Syllabus

Other Financial and Program Topics

(Module 5: Administrative Requirements for Non-Federal Entities)

The third of three modules on Financial and Program Management. When do I need to get prior approval for grant spending? Can I change the program budget? What is cost-sharing and program income? When do I need to have an audit?

Here's what we cover:

This is the third of three Grants Management Boot Camp training courses covering Financial and Program Management topics. This course looks at Other Financial and Program Management Topics, specifically:

1) Requirements for revising budgets and program plans.

2) Standards for cost-sharing and program income.

3) Audit Standards for Recipients of Federal Awards.

4) Insurance and bonding topics.

Learning Objectives:

At the end of this course, you should know and understand the following learning objectives:

1) Identify when budget and program plan changes require prior approval.

2) List the acceptable criteria to include items in cost-share funds.

3) Determine which Audit Standards your Organization is subject to.

4) Describe when insurance and bonding may be required for your Award.

Course #4060 Syllabus
Property Standards
(Module 6: Administrative Requirements for Non-Federal Entities)

What are the different types of property and who really owns the property? What do you mean I have to track it forever? How do I get rid of property I don't need?

Here's what we cover:

In this Grants Management training course, we will look at the Property Standards required for Federal Grant Recipients, specifically:

1) Types of property covered in the Standards.

2) Various ways that title to property purchased with Federal funds can be held.

3) Requirements for care and use of property.

4) Specific requirements related to disposing of property obtained during the Award period.

Learning Objectives:

At the end of this course, you should know and understand the following learning objectives:

1) Describe the types of property covered in the Property Standards.

2) Compare the different ways that property can be titled on Federal Awards.

3) List the requirements for care and use of property purchased with Federal funds.

4) Detail the particular requirements for disposing of property purchased during the Award period.

Course #4070 Syllabus
Procurement Standards
(Module 7: Administrative Requirements for Non-Federal Entities)

Why can't I just buy stuff? What do you mean I have to actively look for small businesses and women and minority owned firms to work with? How much documentation do I need when I make a purchase? What must be in writing?

Here's what we cover:

In this Grants Management training course, we will look at the Procurement Standards requirements for Federal Grant Recipients, specifically:
1) The requirements for written procedures in the Procurement Standards.
2) The elements that must be included in the written procurement procedures.
3) Various topics related to free and open competition in procurements.
4) Other contract Issues such as contract administration, contract requirements and contract provisions.

Learning Objectives:

At the end of this course, you should know and understand the following learning objectives:
1) List what procurement procedures and guidelines must be in writing.
2) Identify elements required to be included in the written procurement procedures.
3) Illustrate procurement practices that may inhibit free and open competition in procuring goods and services for Federal Awards.
4) Describe what documentation should be included with the procurement files.

Course #4080 Syllabus
Closeout of Federal Award
(Module 8: Administrative Requirements for Non-Federal Entities)

You've made it! You are wrapping up your Grant. Now you need to know: When do I need to complete the paperwork? What do I have to keep and how long do I have to keep it? What if we need to change something after the end of the Grant?

Here's what we cover:

In this Grants Management training course, we will look at Closeout of Federal Award and related topics, specifically:
1) Requirements for record retention.
2) Termination and enforcement of Awards.
3) Procedures and related subjects in closing out an Award.
4) Conditions for subsequent adjustments after the Award has closed.

Learning Objectives:

At the end of this course, you should know and understand the following learning objectives:
1) Describe the requirements for record retention.
2) Identify how an Award may be terminated and the remedies for enforcement of Award terms and conditions.
3) List the main issues related to closing out an Award.
4) Detail when subsequent adjustments may be made after an Award has closed.

Course #4110 Syllabus
Cost Principles for Direct Costs
(Module 1: Cost Principles for Non-Federal Entities)

What types of things can I charge to the Grant? What makes a cost a "Direct" cost? How is a direct cost distribution base calculated? What restrictions are there on direct costs? Plus, direct cost examples and why all equipment is not created equal.

Here's what we cover:

This course focuses on Cost Principles for Direct Costs and related topics, specifically:
1) Basic requirements of Award costs.
2) Various other Direct cost topics, such as consistency of cost treatment.
3) Components of cost included in the direct cost base used for calculating the indirect cost rates.
4) Some examples of direct costs which your Organization may incur.

Learning Objectives:

At the end of this course, you should know and understand the following learning objectives:
1) Describe the requirements for allowable Award costs.
2) Identify the criteria for classifying costs as Direct or Indirect costs.
3) List the main types of costs included in the direct cost base.
4) Detail some examples of direct costs that may be incurred by your Organization.

Course #4120 Syllabus
Cost Principles for Indirect (F & A) Costs
(Module 2: Cost Principles for Non-Federal Entities)

How Indirect are costs different from direct costs? What are the various types of Indirect cost rates? Can I choose how to allocate indirect costs? How do you calculate an Indirect cost rate? What is the process for rate negotiation?

Here's what we cover:

This course focuses on Cost Principles for Indirect (F & A) Costs and related topics, specifically:
1) The basics of Indirect costs.
2) How indirect costs are allocated to various cost objectives.
3) Indirect cost negotiation and approval.
4) Some examples of Indirect costs which your Organization may incur.

Learning Objectives:

At the end of this course, you should know and understand the following learning objectives:
1) Identify the components of Indirect costs.
2) Demonstrate how an indirect cost rate may be calculated.
3) Describe the process for negotiation and approval of an indirect cost rate for your Organization.
4) Illustrate some examples of Indirect Costs that may be incurred by your Organization.

Course #4130 Syllabus
<u>**Selected Items of Allowable Costs**</u>
(Module 3: Cost Principles for Non-Federal Entities)

What are the criteria for costs to be Allowable? Can I charge per diem travel costs? How do I know if my expenses are "reasonable"? Are there limits on Professional Service charges? What about pre-spending on an Award to meet our schedule?

Here's what we cover:

This course concentrates on Selected Items of Allowable Costs and related topics, specifically:
1) The basics of cost Allowability.
2) Examples of employee related Allowable costs.
3) Examples of facilities and equipment related Allowable costs.
4) Some examples of Allowable costs which your Organization may incur.

Learning Objectives:
At the end of this course, you should know and understand the following learning objectives:
1) Identify the components of Allowable costs.
2) Distinguish some types of employee related Allowable costs.
3) Describe equipment and facilities related Allowable costs.
4) Illustrate some examples of other Allowable cost types that may be incurred by your Organization.

Course #4140 Syllabus
<u>**Selected Items of Unallowable Cost**</u>
(Module 4: Cost Principles for Non-Federal Entities)

What makes costs Unallowable to charge a Federal Grant? Can I pay for beer at the annual conference? How about donating leftover supplies to the local shelter? And why can't I purchase a big, fancy copier to use directly on our Federal project?

Here's what we cover:

This course concentrates on Selected Items of Unallowable Cost and related topics, specifically:
1) The basics of cost Unallowability.
2) Examples of employee related Unallowable costs.
3) Examples of facilities and equipment related Unallowable costs.
4) Some examples of Unallowable costs which your Organization may incur.

Learning Objectives:
At the end of this course, you should know and understand the following learning objectives:
1) Identify the components of Unallowable costs.
2) Distinguish some types of employee related Unallowable costs.
3) Describe equipment and facilities related Unallowable costs.
4) Illustrate some examples of other Unallowable cost types that may be incurred by your Organization.