

**Course #435 Syllabus****Title: Procurement Boot Camp-Webcast-Live Instructor Led**  
**(6 Contact Hours)**

**Course Objectives:** Procurement Boot Camp navigates the Uniform Guidance 2 CFR Part 200 in **four sessions grouped into two-three-hour learning sections.** These courses explore the procurement requirements in the Administrative Requirements and Cost Principles with a focus on how the various aspects of the grant lifecycle intersect with the procurement standards.

**Course Format:** The online training consists of 6 contact hours of webcast video presentation with live-instructor-led chat, Q & A, and interactive learning. Each participant receives access to Training Guides, Quick Reference Guides, and one year of E-mentoring services.

**Course Length:** Approximately two half-days

**Level:** Basic

**Course Assessment:** Class participation/polling questions, survey, and follow-up.

**Course Audience:** For Current and Potential Federal Award Recipients

**Procurement Boot Camp for Federal Awards**  
**(Sessions 1-4: Procurement Requirements for Non-Federal Entities)**

*These lessons focus on how procurement works within the constraints of the Uniform Guidance through a variety of scenarios during the grant lifecycle. Once you've completed the four procurement sessions, you'll have a solid foundation of how to integrate the procurement standards in managing your current and future federal grants.*

**Course Description:** The Procurement Boot Camp training incorporates the procurement standards in the Uniform Guidance contained in 2 CFR, Part 200, with a particular emphasis on how procurement activities intersect with the various parts of the grant lifecycle.

- 1) Session 1 **Getting Started with Procurement**
- 2) Session 2 **Procurement Standards-Best Practices and Requirements**
- 3) Session 3 **Procurement-The Art and Science of Spending Federal Funds**
- 4) Session 4 **Allowable Costs and Closeout**

### **Learning Objectives:**

Review specific learning objectives on the full course description of the individual sessions contained below.

The Procurement Boot Camp training includes the following topics:

### **Procurement Boot Camp Overview:**

- 1) An overview of who is giving and getting federal grants and exploration of five main areas related to general roles and responsibilities for procurement with federal awards
- 2) The roles and responsibilities for spending federal funds included in the Procurement Standards in 2 CFR Part 200.317-200.326
- 3) The spending lifecycle from the obligation to the expenditure-distinguishing between subawards and procurement contracts, expanding on the best contract types, examining when cost or price analysis are required and sharing tips for using consultants and strengthening internal controls during procurement activities
- 4) What makes costs allowable for federal awards while digging deeper into the common problem areas such as such as property purchases, rental costs, and public relations expenses and wrapping up by examining the closeout process and record retention issues with an emphasis on procurement

### **Here's how the courses work:**

- The Webcast Procurement Boot Camp training with live instructor-led chat includes **comprehensive presentations, training guides, and additional resource files.**
- The six contact hours are spread over two half-days, beginning at 1 PM ET (10 AM PT) and wrapping up at 4 PM ET (1 PM PT). We take a short break mid-session.
- You'll also receive our topical **Quick References Guides.** (These are also great for review since you can skim them quickly to find the significant points on a variety of procurement topics.)
- And you'll have a **full year to** access e-mentoring with a forum to support your questions about the training materials and how to apply them to your procurement responsibilities.

**Questions?** Contact us at [Support@MyFedTrainer.com](mailto:Support@MyFedTrainer.com)

**Individual Session Descriptions:**

**Session 1 Syllabus**

**Getting Started with Procurement**

**(Chapters 1-5)**

*How does the federal award process work? What are the differences between an award and a procurement contract? Which regulations do we have to follow? What are some of the compliance roles and responsibilities for federal award recipients? And how do we find out if someone is suspended or debarred?*

**Here's what we cover:**

This first session of Procurement Boot Camp training includes an overview of who is giving and getting federal grants and explores five main areas related to general roles and responsibilities for procurement with federal awards.

Topics include:

1. The different types of legal instruments used with federal awards and procurement transactions
2. The rules to follow if you are a federal award recipient, subrecipient, and contractor or vendor
3. How federal agencies, grant recipients and pass-through entities manage the risk of noncompliance
4. The pre-award requirements of federal grant recipients, including public policies, contract provisions and disclosures
5. A process to ensure federal funds don't flow to suspended or debarred excluded parties

**Learning Objectives:**

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

1. Differentiate between the legal instruments used for federal awards and procurement transactions with federal funds
2. Identify which provisions in the 2 CFR Part 200 procurement rules apply to states, other non-federal entities, and contractors
3. Distinguish between the risk assessment responsibilities for federal agencies and pass-through entities and the contractor evaluation process
4. Recognize common public policy requirements, contract provisions and mandatory disclosures for federal grant recipients
5. Describe instances when grant recipients should check that a party to a contract or subaward is not suspended or debarred

## Session 2 Syllabus

### Procurement Standards-Best Practices and Requirements

#### (Chapters 1-5)

*What policies must be in writing for federal awards? How do I buy stuff with federal funds? What is a conflict of interest? What do you mean I have to look for small businesses and women and minority-owned firms actively? How much documentation do I need when I make a purchase?*

The second session of Procurement Boot Camp training session digs deeper into the roles and responsibilities for spending federal funds by reviewing the Procurement Standards in 2 CFR Part 200.317-200.326 covering five main areas for procurement with federal awards, including:

1. The types of policies and procedures that must be in writing for federal award recipients
2. The five procurement methods allowed by the Uniform Guidance for purchasing goods and services, including guidelines of sole-source purchases
3. How to avoid unallowable conflicts of interest in your procurement process
4. How to ensure full and open competition during the procurement process while supporting small businesses, women and minority-owned firms
5. The requirements for a contract administration system, adequate documentation of the contracting process and examples of prohibited contracts for federal funds

#### **Learning Objectives:**

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

1. Identify the policies and procedures that 2 CFR Part 200 says must be in writing
2. Differentiate between the five procurement methods used for buying goods and services with federal funds
3. Recognize common issues around conflicts of interest and differentiate between conflicts in appearance vs. conflicts in fact
4. Describe the main requirements for full and open competition and affirmative steps to support small businesses and women and minority-owned firms
5. List the features of a contract administration system and give examples of prohibited contract types

## Session 3 Syllabus

### **Procurement-The Art and Science of Spending Federal Funds**

#### **(Chapters 1-5)**

*When do I have a subaward vs. a procurement contract? What is the best type of contract to use with federal funding? When do I need to do a cost or price analysis? When can we use consultants? What do internal controls mean to purchasers?*

This third session of Procurement Boot Camp training digs deeper into the spending lifecycle from the obligation to the expenditure. We distinguish between subawards and procurement contracts, expand on the best contract types, examine when a cost or price analysis is required, and share tips for using consultants and strengthening internal controls during procurement activities.

Topics include:

1. How to determine whether or not your organization has a subrecipient relationship or a procurement contract
2. How to choose the appropriate type of contract for procurement of goods and services with federal funding
3. When a cost or price analysis is required and exploration of the requirements for negotiation of profit in procurement contracts
4. How to avoid cost disallowance for the use of consultants at your organization
5. The role of the staff in strengthening internal controls to reduce the risk of waste, fraud, and abuse of federal funds

#### **Learning Objectives:**

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

1. Differentiate between subawards and procurement contracts, so the relationship with the organization is correctly classified for the funder
2. Describe the two main types of contract types for procurements with federal funds
3. Recognize common issues when negotiating for a "fair and reasonable" profit element when a cost analysis is required
4. Illustrate ways to document the need for engaging professional service providers such as consultants
5. List ways that procurement activities can support strong internal controls

## Session 4 Syllabus

### Allowable Costs and Closeout

#### (Chapters 1-5)

*What are the criteria for costs to be allowable? What are some examples of unallowable costs for Federal Grants? What are the different types of property? How long do I have to close out an award? What paperwork do I have to keep, and how long do I have to keep it?*

The final session of Procurement Boot Camp training explores what makes costs allowable for federal awards while digging deeper into common problem areas such as such as property purchases, rental costs, advertising, and public relations expenses. The training wraps up by examining the closeout process and record retention issues with an emphasis on procurement.

Topics include:

1. The criteria for costs to be allowable to charge to a federal award
2. How to avoid cost disallowance related to property, rental costs, advertising, public relations and other types of costs
3. The responsibilities for classification and tracking of property
4. How long procurement has to wrap up the closeout functions
5. The general rule for record retention after the end of the federal award

#### **Learning Objectives:**

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

1. List the criteria for allowable costs related to federal awards
2. Describe some examples of unallowable costs to avoid when purchasing goods or services for federal awards
3. Identify the four types of property as defined in 2 CFR Part 200
4. Express the closeout deadlines for federal awards
5. Define the general rule for record retention related to federal awards