



TRAINING TRIBAL AND FEDERAL EMPLOYEES

TUITION FREE

SELF-DETERMINATION TRAINING HANDBOOK

FY 2016

**INDIAN SELF-DETERMINATION EDUCATION AND ASSISTANCE ACT (ISDEAA)
DIVISION OF SELF-DETERMINATION SERVICES
INDIAN SERVICES
BUREAU OF INDIAN AFFAIRS**

*This Handbook can also be found on the web at:
www.bia.gov/whoweare/bia/ois/self-determination/training/index.htm*

ISDEAA TRAINING

WHY WE TRAIN

To plan, conduct, administer and assume programs and projects otherwise provided to tribes and their members through the Indian Self-Determination and Education Assistance Act (ISDEAA). The Act provides for: *“...maximum participation in the Government and education of the Indian people...”**

WHO WE TRAIN

The Bureau of Indian Affairs is vested in training Federally Recognized Tribes, Indian Affairs — Tribal and Federal employees working with P.L. 93-638, as Amended. Training targets the duties and responsibilities in all facets of ISDEAA agreements in methods consistent with applicable laws, rules and regulation, while supporting Congress and the Secretary’s goal of, *“...supporting and assisting Indian tribes in the development of strong and stable tribal governments, capable of administering quality programs...”** through comprehensive technical assistance without impairing the Secretary’s trust responsibility to any tribe or tribal member.

All students must start by taking:
P.L. 93-638, the Law and Regulations, as Amended,
before advancing to further course work.
(See page 6)

*P.L.93-638, the Act.

HOW TO REGISTER FOR A COURSE

(See Page 13)

Federal and Tribal employees interested in attending ISDEAA training courses must register with Jerel Kee via email:

jerel.kee@bia.gov



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Training Targets Tribal and Federal Employees Working with ISDEAA Agreements

Federal Employee Requirements:

No staff may undertake the duties of an AOTR/SAOTR until mandatory training has been completed and the individual is designated in the specific role by an Awarding Official. The Awarding Official will issue a designation letter to the staff upon completion of the mandatory requirements.

- Refresher courses to maintain certification as an Approving Official, or as an AOTR/SAOTR, must be taken no later than two (2) years after the basic training courses, as described above have been completed.
- Approving Officials must complete 24-hours of maintenance training every four years to maintain their appointment.
- Awarding Officials must complete 80-hours of maintenance training every four years. 80-hours of maintenance training are required to include Contract Administration I, II, and III.
- AOTR/SAOTRs must complete 40-hours of maintenance training every two (2) years to maintain their appointment. Failure to maintain the maintenance training requirement may result in designation loss. Maintenance training subject matter can be determined by the staff and their supervisor.

Employees are encouraged to complete additional Federal Acquisition training.

*Delegation of Authority 13 IAM, Chapter 2 requirement.

REMEMBER: ALL COURSES ARE OPEN AND DESIGNED FOR TRIBAL AND FEDERAL EMPLOYEES, INCLUDING THOSE WITH SPECIFIC REQUIREMENTS FOR BIA EMPLOYEES.

All Approving Officials must complete 40 hours of basic training every four (4) years in courses below.

All Awarding Official's Technical Representative/Subordinate Technical Representatives (AOTR/SAOTR), designated in writing by an Awarding Official to provide technical assistance and monitor an ISDEAA Agreement, must complete 40 hours of basic training in the following courses:

Course*	Mandatory Attendance	Credit Hours
P.L. 93-638, the Law and Regulations, as Amended	Approving Officials AOTR/SAOTRs	24-hours
Approving Official AOTR/SAOTR Training	Approving Officials AOTR/SAOTRs	24-hours
Construction Contracting under the ISDEAA — §105/Subpart J ²	Approving Officials AOTR/SAOTR	24-hours
Alternative Dispute Resolution ¹	Approving Officials AOTR/SAOTR	8-hours
Single Audit Process 2 CFR/PART 200	Approving Officials AOTR/SAOTR	16-hours
Section 108 of the Act the Model Agreement ¹	Approving Officials AOTR/SAOTR	3-hours
Section 102 of the Act ¹	Approving Officials AOTR/SAOTR	2-hours
Program Standards and Statements of Work ¹	Approving Officials AOTR/SAOTR	4-hours

*See Course Descriptions (See Page 6).

¹Available through Webinar (See page 14).

²Mandatory Course for Approving Officials and AOTR/SAOTRs working Construction proposals and agreements.



COURSE CATALOGUE

ISDEAA TRAINING COURSE DESCRIPTIONS

Training courses offered under this section will cover all aspects of Public Law 93-638, as Amended. Courses also cover those aspects necessary for the administration and oversight of agreements under the Act. This Course Catalogue indicates required courses for Approving Official Training; Level I Awarding Official certification; the Awarding Official's Technical Representative (AOTR/SAOTR) Certification; and, provides the basic training requirements for certification as a Level II Awarding Official. Specific training and experience requirements for certification as a Level II Awarding Official are found in the Awarding Official Certification System Handbook.

THE PREREQUISITE!



PUBLIC LAW 93-638, THE LAW AND REGULATIONS, AS AMENDED (25 CFR, CHAPTER V, PART 900)

COURSE DESCRIPTION:

This course covers the Intent and Scope of the Law; Federal support and ongoing inherent Federal responsibility; the Standards, Oversight, and Administration of the Model Agreement. This course also covers the Regulations provided in 25 CFR, Chapter V, Part 900, and how they support and guide the Act.

WHO SHOULD ATTEND:

Tribal staff working with Self-Determination Agreements, newly delegated Agency representatives, Approving Officials, Awarding Officials, Agency program staff (AOTRs), and anyone interested in obtaining contracts, grants and cooperative agreements.



AWARDING OFFICIAL'S TECHNICAL REPRESENTATIVE/ SUBORDINATE AWARDING OFFICIAL'S TECHNICAL REPRESENTATIVE TRAINING (AOTR/SAOTR), AND

~APPROVING OFFICIAL TRAINING ~

NOTE: This training course is mandatory for all persons who are, or will be, identified as an Approving Official as well as, P.L. 93-638, the Law and Regulations.

COURSE DESCRIPTION:

Participants, through lecture, discussions, and case studies will learn the role and responsibilities under the delegation of Bureau of Indian Affairs "Authority," the duties and responsibility of Awarding Official's Technical Representative (AOTR), and the Subordinate Awarding Official's Technical Representative (SAOTR), including those of the Approving Official in the ISDEAA agreement processes. Interaction with the awarding official and the approving official will be addressed. The AOTR/SAOTR environment as it relates to standards of conduct, managing the agreement provisions, program and project standards, monitoring the agreement, Alternative Dispute Resolution (ADR), and Cost Principles will be studied.

24-hour credit course

WHO SHOULD ATTEND:

This is a required course for all AOTRs/SAOTRs and Approving Officials. (*These delegated officials must renew their certification by taking this course every two (2) years*). Tribes may be interested in attending to understand the requirements of Bureau liaisons working as technical experts assigned to their contracts, and the requirements of the Bureau's Line Officers.



Single Audit

This course is designed to improve a student's skills in understanding Single Audit Act issues. Students will review audit "Findings" and "Corrective Action Plans" through the guidance of the 5 Indian Affairs Manual, 2 CFR/Part 200, the *Office of Internal Assessment and Evaluation*, and *Harvester.Census.gov* guidance. All 24-hour courses offer an overview of the Single Audit process. It is also offered as a webinar, and a 12-hour credit live training.

16-hour credit course

WHO SHOULD ATTEND:

Tribal staff working with Self-Determination Agreements and expending over \$750,000 of Federal Funds, new delegate Agency representatives, Approving Officials, Awarding Officials, Agency program staff (AOTRs), and anyone interested in obtaining contracts, grants and cooperative agreements.



CONSTRUCTION CONTRACTING: P.L. 93-638 ~ SECTION 105/25 CFR, PART 900, SUBPART J

This course will provide in-depth coverage of ISDEAA Construction Contracting, and 25 CFR, Chapter V, Part 900, Subpart J. It will include coverage on the preparation, negotiation, and award of construction contracts using the authority of the Act, as amended. Development of specifications and drawings, inspection of work and performance standards will be emphasized to detail responsibilities of all parties to a contract. The course involves lecture, group discussion and case studies.

24-hour credit course

WHO SHOULD ATTEND:

Tribal staff working with Self-Determination Construction Agreements, Approving Officials, Level II Awarding Officials, Agency program staff (Technical Experts, i.e.: AOTRs/SAOTRs).



CONTRACT ADMINISTRATION III

The focus of this course is: Monitoring Subpart F Management Systems, ADR, Negotiated Rule-making Act, Contract Support Costs, Reviewing Proposals, and Ethics in Contracting ISDEAA Agreements.

The course is conducted in a workshop format. Emphasis is on “Management Systems” (Finance, Property, and Procurement). Instruction relates the Regulation (Subpart F, 25 CFR, Part 900, Chapter V) to internal and external administrative procedures of the Tribal Organization contracting ISDEAA Agreements. The course covers the important aspects of the administration of ISDEAA Agreements from the proposal process to the ongoing execution. This course is offered every other year. Also included are: ADR, Single Audit, Record-keeping and Contract Support Costs. (*Contract Administration I & II* is offered in opposite years). This is in a workshop format.

24-hour credit course

WHO SHOULD ATTEND:

Tribal staff working with Self-Determination Agreements, Approving Officials, Level II Awarding Officials, Agency program staff (Technical Experts, i.e.: AOTRs/SAOTRs).



FBMS/PRISM FOR SELF-DETERMINATION CONTRACTS, GRANTS AND COOPERATIVE AGREEMENTS

The course is a hands-on training-session conducted in a lab setting to provide instruction in the following phases: award, post-award and close-out. The award phase includes the creation of the award, FAADS reporting, release and obligation. Creation of milestone plans and modifications—including de-obligations and post-award transactions will be covered. How the close-out phase the closeout checklist is completed and the award closed in PRISM. Other topics: general troubleshooting and FAQs information.

16-hour credit course

WHO SHOULD ATTEND:

This course is intended for Self-Determination staff who are role mapped in PRISM to the FA_GSP and FA_AGO roles.



ALTERNATIVE DISPUTES RESOLUTION (CDA/ADR) AND APPEALS TRAINING

This course through lecture, group discussion and exercises will provide participants with a basic understanding of the Contract Disputes Act and procedures, the Alternative Disputes Resolution process, and the Appeals process and procedures.

8-hour credit course

WHO SHOULD ATTEND:

Tribal staff working with Self-Determination Agreements, Approving Officials, Level II Awarding Officials, Level I Awarding Officials and Agency program staff (Technical Experts, i.e.: AOTRs/SAOTRs).



INDIRECT COST

This course provides a basic instruction on managing Indirect Cost. It addresses terminology, and Indirect cost computation through lecture, case studies, and assignments. Participants will learn the terms used in indirect cost and the basics of managing indirect cost.

8-hour credit course

WHO SHOULD ATTEND:

Tribal staff working with Self-Determination Agreements, Approving Officials, Level II Awarding Officials, Level I Awarding Officials and Agency program staff (Technical Experts, i.e.: AOTRs/SAOTRs).



DEVELOPING INDIRECT COST RATES AND IDC PROPOSALS

This course covers the reasons for Indirect Costs; how to calculate tribal need; approvable costs, negotiating with the Interior Business Center, IDC language, for example: *over and under recovery*; and, developing a negotiable proposal prior to meeting with the Interior Business Center.

24-hour credit course

WHO SHOULD ATTEND:

Tribal financial (CFOs, FOs) staff working with Self-Determination Agreements, Approving Officials, Level II Awarding Officials, Level I Awarding Officials and Agency program staff (Technical Experts, i.e.: AOTRs/SAOTRs) wishing to gain greater knowledge of this key process.



START-UP AND PRE-AWARD CONTRACT SUPPORT COST

This course is intended to provide basic understanding and uniform implementation of the Bureau of Indian Affairs Contract Support Policy and Section 106 of the Act regarding Start-up and Pre-Award CSC.

8-hour credit course

WHO SHOULD ATTEND:

Tribal staff working with Self-Determination Agreements, Approving Officials, Level II Awarding Officials, Level I Awarding Officials.



SECTION 108 OF THE ACT ~ THE MODEL AGREEMENT

This course covers all aspects of the terms and conditions of the Model Contract Agreement for non-construction contracts and grants.

3-hour credit course

WHO SHOULD ATTEND:

Tribal personnel, Awarding Officials, Approving Officials, AOTRs, and Self-Determination Specialists.



PROGRAM STANDARDS AND STATEMENT OF WORK

This course covers the preparation of Program Standards and Statements of Work. This is a workshop to assist in the development of ISDEAA proposals. The course involves lecture, group discussion and assignments (case study type issues).

4-hour credit course

WHO SHOULD ATTEND:

Tribes, Awarding Officials, Approving Officials, AOTRs, and Self-Determination Specialists



SECTION 102 OF THE ACT (2-HOUR COURSE)

This course discusses Self-Determination proposals, the 90-day timeframe, the approval and declination process, and, tort claims.

2-hour credit course

WHO SHOULD ATTEND:

Tribes, Awarding Officials, Approving Officials, AOTRs, and Self-Determination Specialists

FY-2016 TRAINING SCHEDULE

Instructor led/Classroom Training

P.L.93-638, THE LAW AND REGULATIONS, AS AMENDED	TO BE ANNOUNCED
FBMS/PRISM OIS INSTRUCTOR	Albuquerque, NM June 14-15
INDIRECT CONTRACT RATES/ CREATING PROPOSALS FOR IDC RATE AGREEMENTS INSTRUCTOR: DEBORAH MOBERLY	Albuquerque, NM April 12-14

NOTE: ONLINE COURSES ARE TEMPORARILY DISABLED WHILE UPDATES ARE MADE.

REGISTRATION

HOW TO REGISTER FOR A COURSE:

Courses are open to Tribal and Federal contract and grant personnel who are directly or indirectly responsible for the design, operation, and management of programs which are contractible under P.L. 93-638 (ISDEAA), as Amended.

The Bureau of Indian Affairs, other Federal Agencies, and Tribal employees interested in attending ISDEAA training courses must contact the training registrar. If you are a Federal employee, you can register by clicking in *Site* in the Bison Connect Gmail and select the Division of Self-Determination Training website. All interested trainees, particularly tribal personnel, must register by contacting our Registrar.

**FOR REGISTRATION AND CONFIRMATION CONTACT, JEREL KEE,
DIVISION OF SELF-DETERMINATION SERVICES TRAINING REGISTRAR:
(202) 513-0781 OR VIA EMAIL: JEREL.KEE@BIA.GOV.**

PREREQUISITE:

All students must start by taking P.L. 93-638, the Law and Regulations, as Amended.

This is a required course for new delegate Agency representatives, Awarding Officials, Approving Officials, Agency program staff (AOTRs), and Tribes interested in obtaining contracts, grants and cooperative agreements. This is a good brush-up course for renewing knowledge in Self-Determination.

CANCELLATIONS:

The Division of Self-Determination Services (DSDS) reserves the right to cancel any training course. The DSDS will do its best to notify registered participants within 24 hours of a class if a course is being cancelled.

If a registered attendee needs to cancel participation in a course, please notify Jerel Kee of your need to withdraw at least 24 hours advanced notice. The training courses are often at capacity and on a waiting list. Your spot could then be offered to another attendee.

WAITING LISTS:

In the event the number of applicants exceeds the maximum class size, a waiting list will be established for the specific course. The names on the waiting lists will be given priority when applying for the next session of the course within the fiscal year.

TUITION/COURSE FEE:

There are no fees or tuition to Federal or Tribal staff for any course listed in this Handbook.

Travel and per diem expenses are the responsibility of the participant and/or the participant's employer.

MATERIALS:

Students are required to download course material to their laptops, desktops, tablets, etc., or print their own hard copies **prior to** attending class. The Division supports technology that makes it easier to download course material to computer-friendly applications, and assists in implementing cost savings as well as eco-friendly measures when conducting these courses.

A list of class material will be emailed to each student as they register for each course. Students will then need to go to the Self-Determination web page: [bia.gov](http://www.bia.gov) and link to Course Material: <http://www.bia.gov/WhoWeAre/BIA/OIS/Self-Determination/index.htm>.

COURSE PARTICIPANTS WITH SPECIAL NEEDS:

Registrants should provide notice of special needs; this will allow the DSDS Training Office to make any necessary arrangements prior to the commencement of the training session.

LOCATION:

Webinars!

Your computer and phone!

Once you register, you will be sent a link to access your selected Webinar.

The audio conference #: (866) 615-6665/Passcode: 30354736.

On-Site

Each participant is responsible for making their own travel and hotel arrangements. A training announcement will be issued which identifies the training course, the training location, and any

specific hotel accommodation arrangements, such as, blocking a number of rooms and arranging special room rates.

Training sessions in Albuquerque, NM will be hosted by the DOI University/National Indian Programs Training Center (NIPTC), 1011 Indian School Rd. NW. 2nd Floor, Albuquerque, NM 87104.

COURSE SCHEDULE REVISIONS/ADDITIONS:

Course data and training locations are subject to change. Training participants will be informed of any revisions prior to the beginning of the training session.

CERTIFICATES:

Central Office will award certificates to federal students who have fully attended the course, and achieved an 80% average on all core curriculum and/or graded material. Achieving a level of accuracy in each course assists in determining competency and the knowledge necessary toward Awarding Official certification in accordance with the Awarding Official's Certification System.

The DSDS Trainer will issue re-take exams for those federal personnel who do not initially pass at the first sitting. If they do not pass the second exam, their supervisor will issue a third and final attempt. Federal students will be required to retake the course if they do not pass the third and final attempt.

Certificates may take up to four weeks for delivery!

SPECIAL TRAINING REQUESTS:

Special Requests for training are "unscheduled courses." All courses listed as Basic and General courses in this handbook are available on request. Bureau Regional and Agency Offices, or Indian tribes and tribal organizations, may request a special course be provided at a location within their region through the local Bureau Office. Training site location and training material copying will be the responsibility of the requesting Bureau entity. **Submit a written request identifying the specific course and proposed dates for training to the Chief, Division Self-Determination Services.**

NOTE: All training is subject to the availability of the instructor.

CONTACT INFORMATION

SUNSHINE JORDAN	ACTING CHIEF, DIVISION OF SELF-DETERMINATION SERVICES	(202) 513-0781
JEREL KEE	REGISTRAR	(202) 513-0781

SENIOR REGIONAL AWARDING OFFICIALS

Dolores Ayotte	Alaska Region	(907) 271-4086
Frank Bitonti	Southwest Region	(505) 563-3731
Timothy Brown	Northwest Region	(503) 231-6760
Stella Corbin	Rocky Mountain Region	(406) 247-7983
Yvonne LaRocque	Great Plains Region	(605) 226-7426
Jeanette Quintero (Acting)	Navajo Region	(505) 863-8401
Victoria May	Pacific Region	(916) 978-6024
Michelle Corbine	Midwest Region	(612) 725-4588
Kelly K. Moore	Southern Plains Region	(405) 247-1574
Kirk Meyer	Eastern Region	(615) 564-6962
Glenn Shafer	Western Region	(602) 379-4189
Sherri K. Smith	Eastern Oklahoma Region	(918) 781-4646