

**BUREAU OF INDIAN AFFAIRS**

**INDIAN SERVICES**

**DIVISION OF SELF-DETERMINATION SERVICES**

**FY-2008 Training Handbook**

**FOR**

**PUBLIC LAW 93-638, AS AMENDED**

**THE INDIAN SELF-DETERMINATION**

**AND**

**EDUCATION ASSISTANCE ACT**

**OF**

**1975**

**AND**

**CONTRACT RELATED COURSES**

**ISSUE DATE: October 1, 2007**

# **PUBLIC LAW 93-638**

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# GENERAL INFORMATION

## ***PURPOSE OF TRAINING***

To ensure that all Bureau of Indian Affairs (Bureau) employees are provided the opportunity to receive training in Public Law 93-638 (The Indian Self-Determination and Education Assistance Act of 1975), as amended (Act), and to ensure that all Bureau employees charged with the responsibility to carry out the purpose and intent of the Act are provided training. To prepare those Bureau employees responsible for any facet of the administration of contracts and grants awarded under the Act to do so consistent with applicable laws, rules, and regulations; and, to enable staff to provide guidance and technical assistance to tribes and tribal staff. To acquaint tribal staff and officials of the opportunities for innovative program design and operation under the Act, and to equip tribal staff and officials to administer contracts and grants in accord with the regulations for the implementation of the Act, the Office of Indian Services (OIS) encourages tribal staff to attend training with Bureau staff to promote common understanding of the law, regulations, and intent of programs.

The training is also designed to meet the self-determination training requirements established for Level I and Level II awarding officials. That is, there are courses designed to satisfy awarding official training requirements, as well as, for certification of individual awarding officials. Other courses are included as continuing education, or maintenance course requirements to allow certified awarding officials to maintain their certification. Courses listed in support of the awarding official training requirements are so identified. The Office of Indian Services encourages self-determination and tribal staff to also attend Federal Acquisition courses, specifically those that are Federal Acquisition Institute (FAI) approved.

**NOTE:** See the Awarding Official Certification System (AOCS) Handbook for education, experience and training requirements for Level I and II Awarding Officials. The AOCS Handbook is available from the Office of Indian Services in the Central Office.

## ***HOW TO REGISTER FOR A COURSE***

Courses are open to all Bureau employees, with attention to employees involved in the self-determination contracting process, as well as, non-Bureau and tribal grant and contract personnel who are directly or indirectly responsible for the design, operations and management of programs which are contractible under Public Law 93-638, as amended.

Bureau, non-Bureau and tribal employees interested in attending Pub. Law 93-638 training courses must contact the Regional Office identified to host a specific course to register for that course.

**Class size for each course will be limited to sixty (60) participants. Persons who do not register with the host Regional Office cannot be assured a place in the specific course offering.**

## ***CANCELLATIONS***

Registrants unable to attend are urged to report cancellations to the host Regional Office at least two weeks prior to the specific course date so that substitutions can be made. Substitutions may be made until the beginning of the course.

## ***WAITING LISTS***

In the event the number of applicants exceeds the maximum class size, the host Regional Office will establish a waiting list for the specific course. The Office of Indian Services will endeavor to schedule another session of that course in the host Region. The names on these waiting lists will be given priority for the next session of the course (if offered) within the fiscal year.

## ***TUITION/COURSE FEE***

There is no tuition or course fee to Bureau, tribal, or other agency staff for any course listed in this Handbook. Travel and per diem expenses are the responsibility of the participant or the participant's employer.

## ***COURSE PARTICIPANTS WITH SPECIAL NEEDS***

The host Regional Office should be notified if a registrant has a special need. This will allow the host Regional Office to make any necessary arrangements prior to the commencement of the training session.

## ***LOCATION***

Classes will be hosted by various Regional Offices that will arrange for copying of the training materials and locating the training site. The Regional Office will issue a memo to announce the training session, the training location, and any specific hotel accommodation arrangements, such as blocking a number of rooms and arranging special room rates, and identify a contact person for registration and information purposes. Host regions are encouraged to select training sites convenient for tribes within their jurisdiction. Each participant is responsible for making their own travel and hotel arrangements.

Training sessions in the Southwest Region (Albuquerque, NM) will be hosted by the National Indian Programs Training Center (NIPTC). The NIPTC shall arrange for copying of the training materials and issue an announcement of the training session and identify a contact person for registration purposes. The training session will be held at the NIPTC each participant shall be responsible for making their own lodging and local transportation arrangements.

**NOTE:** The FY-2008 Training Schedule, identifying host Regional Offices and the NIPTC, course name, and training dates, is included as part of this Handbook.

## ***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.

## ***COURSE CANCELLATIONS***

The Office of Indian Services reserves the right to cancel any training course. The Office of Indian Services will endeavor to notify registered participants prior to the first day of a class if a course is being canceled.

## ***CERTIFICATES***

The Office of Indian Services will issue certificates of completion to Bureau participants. The host Regional Office will issue certificates of completion to all tribal and other participants. These certificates will document completion of the course, and document completion of course needs for Awarding Official Certification and document maintenance training. The Host Regional Office will provide the participant list and daily participant sign-in sheets for each course to the Office of Indian Services, Division of Self-Determination Services, Self-Determination Advisor, Terry Parks. The participant list shall provide the name, job title, mailing address, and telephone number for each participant. The participant list and daily sign-in sheets shall be used for preparation of the certificates. Ensure that names are legible, to ensure accuracy in documentation and correct spelling for certificates.

## ***SPECIAL 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 through the local Bureau Office, may request a special session of a course be provided at a location within their region. Training site location, training material copying, and travel and per diem costs for the instructor will be the responsibility of the requesting Bureau entity. Submit a specific written request identifying the specific course and proposed dates for training to the Deputy Bureau Director, Indian Services.

**NOTE:** Provision of training shall be subject to the availability of the instructor.

## COURSE DESCRIPTIONS FY-2008

### LEVEL I AWARDING OFFICIAL COURSES

*Training courses offered under this section will cover all aspects of Public Law 93-638, as Amended. They also cover those aspects necessary for the administration and oversight of contracts under the Act; and provide the basic training requirements for certification as a Level I awarding official. Specific training and experience requirements for certification as a Level I Awarding Official are found in the Awarding Official Certification System Handbook.*

#### REQUIRED COURSES

<p><b><i>PUBLIC LAW 93-638, AS AMENDED, AND THE IMPLEMENTING REGULATIONS (25 CFR, Chapter V, Part 900, Subparts A - P) (2½ - Day Course)</i></b></p>	<p>Training will cover sections 2 - 9 and Title I of Pub. Law 93-638, as amended, and the implementing regulations (25 CFR 900). This is a required course for new delegate Agency representatives, awarding officials, Agency program staff, and anyone interested in obtaining self-determination contracts.</p>
<p><b><i>AWARDING OFFICIAL'S TECHNICAL REPRESENTATIVE (AOTR) (2½ - Day Course)</i></b></p>	<p>Participants through lecture, discussions, and case studies will learn the role and responsibilities of the Awarding Official's Technical Representative (AOTR), and the Subordinate Awarding Official's Technical Representative (SAOTR), in the self-determination contracting process. Interaction with the awarding official and the approving official will be addressed. The AOTR/SAOTR environment as it relates to standards of conduct and ethics will also be discussed.</p> <p><b>NOTE:</b> This course is mandatory for all persons who are, or will be, identified as an AOTR or SAOTR.</p>
<p><b><i>CONTRACT ADMINISTRATION Part I (2½ - Day Course)</i></b></p>	<p>This course provides training on the contract administration process and procedure. Emphasis is on performance based specifications. Instruction relates regulations to internal and external administrative procedures. Participants will review and discuss Program Standards and Statement of Work, and Monitoring Plans. The course involves lecture, group discussion and assignments (case study type issues).</p>
<p><b><i>CONTRACT ADMINISTRATION Part II (WORKSHOP) (2½ - Day Course)</i></b></p>	<p>This course is conducted in a workshop format. Emphasis is on the "how to" of contract administration. Instruction relates regulations to internal and external administrative procedures. Participants shall prepare and critique contract proposals and contract documents (Section 108 and Annual Funding Agreement). The course involves lecture, group discussion and assignments (case study type issues). It provides training on the contract administration process and procedure.</p>

## COURSE DESCRIPTIONS FY-2008

### LEVEL II AWARDING OFFICIAL COURSES

*Training courses offered under this section will cover all aspects of Public Law 93-638, as Amended. They also cover those aspects necessary for the administration and oversight of contracts under the Act; and with the courses required for Level I certification as a prerequisite, provide 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.*

### REQUIRED COURSES

<p><b>CONSTRUCTION CONTRACTING UNDER PUB. LAW 93-638, AS AMENDED (25 CFR, Chapter V, Part 900, Subpart J) (2½ - Day Course)</b></p>	<p>This course will provide in depth coverage of Construction Contracting under Pub. Law 93-638, as amended, 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 Pub. Law 93-638, 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.</p>
<p><b>CONTRACT DISPUTES ACT / ALTERNATIVE DISPUTES RESOLUTION (CDA/ADR) and APPEALS TRAINING (2½ - Day Course)</b></p>	<p>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.</p>

## COURSE DESCRIPTIONS FY-2008

### APPROVING OFFICIAL COURSES

*Training courses offered under this section will cover the necessary aspects of Public Law 93-638, as Amended for Line Officers. The courses are designed to cover those aspects necessary for the Line Officers to perform their duties as Approving Officials. These courses are included in a single training session for Line Officers.*

### REQUIRED COURSES

<p><b><i>PUBLIC LAW 93-638, AS AMENDED, AND THE IMPLEMENTING REGULATIONS (25 CFR, Chapter V, Part 900, Subparts A - P) (2 - Day Course)</i></b></p>	<p>Training will cover sections 2 - 9 and Title I of Pub. Law 93-638, as amended, and the implementing regulations (25 CFR 900). This is a required course for Line Officers, new delegate Agency representatives, awarding officials, Agency program staff, and anyone interested in obtaining self-determination contracts. This reviews the 13 IAM Parts 2,3 and 4.</p>
<p><b><i>AWARDING OFFICIAL'S TECHNICAL REPRESENTATIVE (AOTR) (1½ - Day Course)</i></b></p>	<p>Participants through lecture, discussions, and case studies will learn the role and responsibilities of the Awarding Official's Technical Representative (AOTR), and the Subordinate Awarding Official's Technical Representative (SAOTR), in the self-determination contracting process. Interaction with the awarding official and the approving official will be addressed. The AOTR/SAOTR environment as it relates to standards of conduct and ethics will also be discussed.</p>

**NOTE:** These two courses are included in a single Approving Official training session. This training session is recommended for all persons who are, or will be, identified as an Approving official.



## COURSE DESCRIPTIONS FY-2008

### MAINTENANCE COURSES

*These courses are designed to provide increased knowledge in Federal acquisition and Pub. Law 93-638, as amended, as well as, areas identified as important to Bureau management. These courses are maintenance courses and apply to the body of knowledge available for Pub. Law 93-638 contracting.*

### GENERAL COURSES

<p><b>PROGRAM STANDARD AND STATEMENT OF WORK</b> (2½ - Day Course)</p>	<p>This course provides insight to the preparation of Program Standards and Statements of Work. Instruction relates regulations to internal and external administrative procedures. Participants will develop Program Standards and Statements of Work, and an Annual Funding Agreement. The course involves lecture, group discussion and assignments (case study type issues).</p>
<p><b>BASIC INDIRECT COST</b> (2½ - Day Course)</p>	<p>This course provides a basic instruction on managing Indirect Cost. Addresses terminology, OMB Circular A-87, 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.</p>
<p><b>Direct Contract Support Policy</b> (1 - Day Course)</p>	<p>This course provides basic instruction on the Bureau of Indian Affairs Direct Contract Support Policy. Through lecture and group discussion participants will learn the purpose and intent of these documents</p>
<p><b>Implementation of Direct Contract Support</b> (2 - Day Course)</p>	<p>This course is intended to provide basic understanding and uniform implementation of the Bureau of Indian Affairs Direct Contract Support Policy..</p>
<p><b>Contract Administration Part III</b> (2½ - Day Course) <b>[NEW COURSE]</b></p>	<p>This course is conducted in a workshop format. Emphasis is on "Management Systems" (Finance, Property, and Procurement). Instruction relates regulations to internal and external administrative procedures. Participants discuss management systems concerns. The course involves lecture, group discussion and assignments (case study type issues). It provides training on the review and monitoring of management systems aspect of contract administration.</p>

## COURSE DESCRIPTIONS FY-2008

### BASIC COURSES

*Training courses offered under this section provide an introduction to the Delegation of Authority process, general Federal acquisition and Public Law 93-638, as amended. These are the basic courses and are available to all Bureau of Indian Affairs and tribal employees.*

### COURSES

<p><b>DELEGATE AGENCY TRAINING</b> <i>(Implementation of the Delegation of Signature Authority)</i> <i>(3 - Day Course)</i></p>	<p>Delegation of Authority to the Agency level is the policy of the Bureau of Indian Affairs. This course provides an overview of the delegation process and addresses the delegation of signature authority for Pub. Law 93-638 contracts in specific. The duties and responsibilities of Agency staff under this delegation of authority will be discussed. Training follows 13 IAM, Chapter 2.</p>
<p><b>FEDERAL ACQUISITION PROCESS</b> <i>(2 - Day Course)</i></p>	<p>Training will provide a basic overview of the Federal acquisition process and its goals, the elements of a contract, and the basic statutes and regulations that control the Federal acquisition process. Training will discuss how Pub. Law 93-638, as amended, changes the normal acquisition process.</p>
<p><b>INTRODUCTION TO PUBLIC LAW 93-638, AS AMENDED</b> <i>(1 and 2 - Day Course)</i></p>	<p>Training will cover Pub. Law 93-638 and its major amendments (Pub. Laws 100-472, 101-644 Title II, and 103-413). Training will provide a historical overview and introduction. There are two (2) courses addressing this subject:</p> <p>1 Day Course: For those employees with little or no continuous involvement with Pub. Law 93-638 on a daily basis. Individuals who should attend this course include: General Administration; Finance; and Budget personnel.</p> <p>2 Day Course: For those employees with continuous or on-going involvement with Pub. Law 93-638 on a daily basis. Individuals who should attend this course include: Program personnel and Contracting personnel.</p>

**PUBLIC LAW 93-638  
FY-2008 TRAINING SCHEDULE**

<b>COURSE</b>	<b>DATE</b>	<b>LOCATION</b>
<b>Construction Contracts Under Public Law 93-638, as Amended (25 CFR, Chapter V, Part 900, Subpart J)</b>  <b>Instructor: Frank Larson</b>	01/15-17/08	Eastern Region (Ben Picotte)
	01/29-31/08	Southern Plains Region (Connie Fox)
<b>Contract Disputes Act, Alternative Disputes Resolution, and Appeals</b>  <b>Instructor: Frank Larson</b>	02/05-07/08	Pacific Region (Sunshine Jordan)
	02/12-14/08	Nat'l Indian Programs Training Center (NIPTC) (Linda Romero or Esther Lopez)
<b>Contract Administration Part III (Management Systems)</b>  <b>Instructor: Edward Mouss</b>	02/26-28/08	Eastern Oklahoma (Roy Willis)
	03/11-13/08	Nat'l Indian Programs Training Center (NIPTC) (Linda Romero or Esther Lopez)
<b>Public Law 93-638, as Amended (Law) and 25 CFR, Chapter V, Part 900, Subparts through P (Regulations)</b>  <b>Instructor: Frank Larson</b>	03/25-27/08	Alaska Region (Frank Bitonti)
	04/08-10/08	Great Plains Region (Lorraine Brockie)
	04/15-17/08	Navajo Region (Sharon Pinto)

**PUBLIC LAW 93-638  
FY-2007 TRAINING SCHEDULE**

<b>COURSE</b>	<b>DATE</b>	<b>LOCATION</b>
<b>Awarding Official Technical Representative (AOTR) / Subordinate Awarding Official Technical Representative (SAOTR)</b>  <b>Instructor: Frank Larson</b>	04/29-05/01/08	Alaska Region (Frank Bitonti)
	05/13-15/08	Eastern Region (Ben Picotte)
	05/20-22/08	Nat'l Indian Programs Training Center ( NIPTC) (Linda Romero or Esther Lopez)
	06/10-12/08	Navajo Region (Sharon Pinto)
<b>Basic Indirect Cost</b>  <b>Instructor: Edward Mouss</b>  <b>NOTE: THE DATES, LOCATIONS AND NUMBER OF TRAINING SESSIONS WILL BE ANNOUNCED AT A LATER DATE BY EDWARD MOUSS.</b>	<b>DATES TO BE DETERMINED</b>	<b>LOCATIONS TO BE DETERMINED</b>
<b>Contract Administration - Part I</b>  <b>Instructor: Frank Larson</b>	07/22-24/08	Navajo Region (Sharon Pinto)
	07/29-31/08	Alaska Region (Frank Bitonti)
	08/05-07/08	Eastern Region (Ben Picotte)
	08/12-14/08	Nat'l Indian Programs Training Center ( NIPTC) (Linda Romero or Esther Lopez)
<b>Contract Administration - Part II (Workshop)</b>  <b>Instructor: Frank Larson</b>	08/19-21/08	Navajo Region (Sharon Pinto)
	08/26-28/08	Eastern Oklahoma (Roy Willis)
	09/09-11/08	Nat'l Indian Programs Training Center ( NIPTC) (Linda Romero or Esther Lopez)
	09/16-18/08	Alaska Region (Frank Bitonti)

<b>PUBLIC LAW 93-638 FY-2007 TRAINING SCHEDULE</b>		
<b>COURSE</b>	<b>DATE</b>	<b>LOCATION</b>
<b>Approving Official</b> (Law and Regulations - AOTR/SAOTR) (13 IAM Parts 2,3 and 4)  <b>Instructor: Frank Larson</b>	<b>03/04-07/08</b>	<b>Midwest Region</b> <b>(Stu Mani)</b>
<b>Approving Official</b> (Law and Regulations - AOTR/SAOTR) ( 13 IAM Parts 2,3 and4)  <b>Instructor: Frank Larson</b>	<b>04/22-25/08</b>	<b>Nat'l Indian Programs</b> <b>Training Center ( NIPTC)</b> <b>(Linda Romero or Esther</b> <b>Lopez)</b>

<b>PUBLIC LAW 93-638 FY-2007 TRAINING SCHEDULE</b>		
<b>COURSE</b>	<b>DATE</b>	<b>LOCATION</b>
<b>Single Audit</b> <b>and</b> <b>Audit Resolution</b>  <b>Instructor: To Be Announced</b>	<b>05/06-08/08</b>	<b>Nat'l Indian Programs</b> <b>Training Center (NIPTC)</b> <b>(Linda Romero or Esther</b> <b>Lopez)</b>
<b>Direct Contract Support Policy</b> <b>Instructor: Edward Mouss</b>  <b>and</b>	<b>06/03/08</b>	<b>Nat'l Indian Programs</b> <b>Training Center ( NIPTC)</b> <b>(Linda Romero or Esther</b> <b>Lopez)</b>
<b>Implementation of Direct Contract Support</b> <b>Instructor: Edward Mouss</b>	<b>06/04-05/08</b>	

<b>PUBLIC LAW 93-638 FY-2007 TRAINING SCHEDULE</b>		
<b>COURSE</b>	<b>DATE</b>	<b>LOCATION</b>
<b>Delegate Agency Training</b>	Upon Request	
<b>Introduction to Public Law 93-638, as Amended:</b>  <b>1 - Day Course</b>  <b>2 - Day Course</b>	As determined by Bureau management and/or upon request.	
<b>Program Standard and Statement of Work</b>	Upon Request	

**PUBLIC LAW 93-638  
FY-2007 TRAINING SCHEDULE  
CONTACT PERSON**

<b>NAME</b>	<b>REGION</b>	<b>ADDRESS</b>	<b>TELEPHONE/FAX</b>
Frank Bitonti	Alaska	Alaska Regional Office P.O. Box 25520 Juneau, AK 99802-5520	(907) 586-7171 Fax: (907) 586-7525
Ben Picotte	Eastern	Eastern Regional Office 545 Marriott Drive Nashville, TN 37214	(615) 564-6730 Fax: (615) 564-6525
Roy Willis	Eastern Oklahoma	Eastern Oklahoma Regional Office 3100 Peak Blvd Muskogee, OK 74402	(918) 781-4646 Fax: (918) 781-4663
Lorraine Brockie	Great Plains	Great Plains Regional Office 115 4 <sup>th</sup> Avenue, SE Aberdeen, SD 57401	(605) 226-7426 Fax: (605) 226-7429
Stuart Mani	Midwest	Midwest Regional Office 1 Federal Dr., Rm. 550 Ft. Snelling, MN 55111	(612) 725-4507 Fax: (612) 713-4435
Sharon Pinto	Navajo	Navajo Regional Office P.O. Box 1060 Gallup, NM 87305	(505) 863-8311 Fax: (505) 863- 8461
Sunshine Jordan	Pacific	Pacific Regional Office 2800 Cottage Way Sacramento, CA 95825	(916) 978-6024 Fax: (916) 978-6099
Stella Corbin	Rocky Mountain	Rocky Mountain Regional Office 316 North 26 <sup>th</sup> Street, Room 4051 Billings, MT 59101	(406) 247-7988 Fax: (406) 247-7566
Constance Fox	Southern Plains	Southern Plains Regional Office WCD Office Complex P.O. Box 368 Anadarko, OK 73005	(405) 247-1574 Fax: (405) 247-6409
Linda Romero Esther Lopez Registrars	Southwest	Nat'l Indian Programs Training Center 1011 Indian School Rd. NW, Suite 254 Albuquerque, NM 87104	(505) 563-5404 (505) 563-5405 Fax: (505) 563-5419
Carolyn Richards	Western	Western Regional Office Self-Determination Services 2 Arizona Center 400 N. 5 <sup>th</sup> Street, 12 <sup>th</sup> Floor Phoenix, AZ 85004	(602) 379-4189 Fax: (602) 379-6763