

## **Post-award Education Program (PEP)**

Sponsored Projects Administration (SPA) presents the Post-award Education Program (PEP), a curriculum of twelve core courses on the fundamentals of post-award sponsored projects management.

Taught by experienced sponsored project administration personnel, these regularly offered courses are designed to provide "department administrative staff" (including department administrators, division managers, department fiscal managers, department effort coordinators, etc.) with a strong foundation in the essential elements of successfully managing their sponsored projects.

Each PEP course is two hours long, and enrollment in each session is limited to 25 to allow for more open discussion and better one-on-one interaction.

### **Core Curriculum Course Descriptions:**

#### **1. SPA 101: Project Management Responsibilities**

This course thoroughly examines the post-award lifecycle of sponsored projects at OHSU. Students are given an inside look at the workings of the SPA office and the basics of post-award administration to help them understand the forms, policies, and procedures involved in management and documentation of post-award activities at OHSU.

#### **2. OMB Circulars and Beyond**

This course provides students with a strong foundation in Circulars A-21, A-110, and A-133 issued by the federal Office of Management and Budget (OMB) to define the principles and standards for agreements between federal agencies and research institutions. Detailed and complex, these Circulars can be difficult to understand, but a clear grasp of their central principles is essential for the effective management of federally sponsored projects.

#### **3. Understanding Facilities & Administrative Costs**

This course examines the details of Facilities & Administrative (F&A) costs which represent OHSU's project-related expenses that cannot be allocated to any single project. F&A costs, also known as "indirect" costs or "overhead," include buildings and maintenance, libraries, and institutional infrastructure. They are reimbursed from project budgets according to approved rates negotiated with our sponsors by Central Financial Services (CFS).

#### **4. Cost Sharing & Effort Issues**

This course covers the basics of cost sharing. Sometimes referred to as "in kind" or "matching," cost sharing represents that portion of a project or program not financially supported by the sponsor. Although cost sharing on a project may be mandatory or voluntary, once it is formalized as part of the award agreement, our sponsors reasonably expect it to be appropriately tracked and reported.

#### **5. Costing and Cost Transfers**

When following accepted cost accounting principles as well as institutional policies and the appropriate federal regulations, completed transactions should ideally not need correction; however, in certain circumstances, changes are required to move expenses between research projects, expenditure types or different types of funds at OHSU. This course moves step-by-step through general cost accounting standards as well as the stages involved in a cost transfer—justification, documentation, and approval.

#### **6 & 7. Post-Award Activities I & II**

The successful management of a sponsored project involves a thorough understanding of the award document and various post-award activities and administrative actions that allow a project to move forward with its research agenda while practicing appropriate stewardship of the sponsor's funds. These two courses encompass post-award activities for both federal and non-federal awards and focus on practical, hands-on examples of day-to-day award management.

#### **8. Clinical Trials I (pre-award)**

Clinical trial budgets involve many issues unlike those found in the budgets for other types of sponsored projects. These courses explore these unique budgeting issues, examine how to deal with them, and explain how to prepare budgets for both industry and non-industry sponsored clinical trials, how to obtain appropriate hospital accounts, and how to deal with clinical trial specific charges and payments.

#### **9. Clinical Trials II (post-award)**

Industry clinical trial post-award topics covered in the course include understanding what occurs in the setup process, the difference between the awarded amount of the study and the clinical trial budget in Oracle Grants Accounting (OGA), and the purpose and importance of OGA end & close dates. This course also explores applying

and managing cash; handling invoices; managing expenses and deficits; preparing the project for financial closeout; and setting up and managing post-closing Program Development Accounts (PDA's).

**10. *Closeouts***

This course maps out the responsible offices for closeout activities, explaining the procedures for final financial reporting and closeout documentation, final scientific progress reporting, and other reporting requirements. This course also addresses federal and OHSU policies and best practices for the retention of fiscal and programmatic records.

**11. *Understanding the A-133 Audit***

This course offers a step-by-step explanation of OHSU's annual external audit mandated by the federal sponsorship requirements set forth in OMB Circular A-133. This course addresses not only the audit activities carried out in the SPA office, but offers suggestions for how departments can help streamline the audit process and ensure that OHSU receives a positive audit report each year.

**12. *Effort Reporting***

Offered biannually to coincide with the distribution of Effort Certification Statements (ECS), this course examines not only the federal requirements that shape OHSU's institutional policies but also the details of OHSU's Effort Certification Procedure, including reporting frequency and shared accountability. This course highlights any recent changes in procedures and is strongly encouraged for all Department Effort Coordinators, even those who may have attended it in the past.