Welcome

Patti Manheim, Director, OCGA
Agenda

• Welcome - Patti Manheim

• OCGA Updates – Patti Manheim
  * Consortium/contractual arrangements versus purchase of services
  * Master Calendar of OCGA training sessions

• Indirect Cost Rate Agreement – David Beckstrom

• EFM Updates – Nate Haines
  * Automatic notifications
  * Effort reporting update
  * Payroll expense transfer processing
  * EVerify requirements

• ORIS Updates – Jessica Lee
  * LearnIT.ucla.edu
OCGA Updates

Patti Manheim
Office of Contract and Grant Administration

June 9, 2011
Subgrants/Subcontracts versus Purchase of Goods and Services

- Applies to third-party recipients other than the principals involved in the transaction
Subgrants/Subcontracts

- Very specific scholarly task
- Intellectual contribution
- Design, conduct and reporting of the performance/deliverables
  - Are publications anticipated from third-party entity?
  - Will individuals from third-party entity be co-authors on articles?
- Contribute to a measurable portion of UCLA work.
- Performs research or non-commercial research related services.
Purchase of Goods and Services

- Procurement
  - Purchase of Goods and services used by UCLA in accomplishment of the project goals
- No design, conduct or reporting
- No independent research/little or no discretionary judgment.
- Non-University labor or services
- Equipment or components parts for fabricated equipment which will be delivered to, and used by the sponsor or other entity designated by the sponsor
- Goods or services offered to public at large.
Subgrants/Subcontracts versus Purchase of Goods and Services

- Why is correctly clarifying a subrecipient important?
  - Flow down obligations – IP rights
  - Different allowablility standards for different kinds of third part agreements
  - Correct application of F&A
    - risk of under calculation of project costs
    - department may be on the line if third party recipient is incorrectly categorized
Subgrants/Subcontracts versus Purchase of Goods and Services

- Let OCGA help you
- Ask EARLY, Ask OFTEN
- Visit the OCGA Subaward Initiation and Management website

QUESTIONS???
OCGA “Master Calendar”

**INTENT:**

- More face-to-face interaction with the research community by providing monthly informal training sessions
- Meet specific training needs of the community and/or OCGA
- Focus on a single, focused topic related to pre-award administration
- Ability and flexibility to address current issues/topics in a timely manner
OCEGA “Master Calendar”

SCHEDULING

- Held in Kinross (ORA) Conference Rooms
- Monthly, 60 - 90 minute sessions
- Beginning September 2011
POTENTIAL TOPICS:

- Proposal budget preparation ~ salaries/wages, direct costs, calculating F&A costs, budget justification
- Internal forms ~ EPASS/GR, COI (700 series), PHS forms
- Subgrants vs. subcontracts ~ process, negotiation issues
- Close-out Documents ~ Who is responsible for what?
- Award negotiation ~ problematic terms and why you should care
- Non monetary agreements ~ equipment loan, Data Use Agreements, etc.
- NSF FastLane
- Criteria for reviewing proposal applications ~ what OCGA looks for and why
- Progress reports (E-snaps)
OCGA “Master Calendar”

❖ Other Topics?
  ➢ Add a comment to your RAF evaluation

QUESTIONS???