

AUSTIN, TX • OCTOBER 2-5, 2017

Comprehensive FAR Compliance and Oversight Training for State DOTs and A/E Firms:

A special 2-part program developed by the FHWA National Highway Institute

*Mysteries of the FAR Revealed:
Using the AASHTO Audit Guide*



Mysteries of the FAR Revealed: Using the AASHTO Audit Guide

This important program of two key courses is designed to educate transportation public- and private-sector practitioners on government contracting for A/E services, and the administration and oversight of contract costs.

At a Glance

COURSE 1 – **Indirect Cost Rates: Development**

This two-day course details how to apply the AASHTO Audit Guide in the development and administration of A/E consultant direct and indirect costs and rates.

Who should attend: All DOT and A/E firm personnel who administer/manage contracts; develop/review RFPs and contracts for government procurement; build/review cost proposals; perform indirect cost rate audits; and provide oversight of contracts and costs.

COURSE 2 – **Indirect Cost Rates: Auditing and Oversight**

The second and most advanced two-day course focuses on audit requirements and procedures in reviewing compliance with federal regulations and guidance.

Who should attend: Public agency personnel and private sector practitioners with responsibilities for ensuring compliance with federal procurement regulations and consistency with the AASHTO Audit Guide.

Also recommended: Anyone who performs/reviews indirect cost rate audits; evaluates cost elements and proposals; performs final reconciliation of contracts, design and enforce internal control systems; and conducts oversight and risk management activities.

To reinforce learning, both courses incorporate:

- Small and large group discussions
- Case study activities
- Scored and unscored assessments

Expert Faculty:



Dan Purvine is President of A/E Clarity Consulting and Training, a firm specializing in helping A/E firms navigate the complex rules and regulations applicable to state, federal, and local agency contracts. With more than 14 years' experience in the A/E industry as Vice President of Finance and Accounting for Kimley-Horn and Associates, Purvine also serves as Chair of ACEC's Audit Subcommittee. He works closely with AASHTO and FHWA to address issues related to consistent application of the Federal Acquisition Regulations, revisions to the AASHTO Audit Guide, and related regulations and guidance, and led the team that developed these training courses for the National Highway Institute on the implementation and use of the AASHTO Audit Guide.



Jerry J. Jones has over 36 years of experience in auditing, accounting, management consulting, budgeting and tax advisory services, and is nationally recognized for his expertise on the uniform accounting and auditing of A/E firms engaged in projects involving the Federal-Aid Highway Program. As owner of Jerry J. Jones, CPA, PLLC, he provides consultation on governmental accounting and auditing for transportation agencies and A/E firms. Formerly Commission Auditor, Michigan Department of Transportation, he developed and directed a comprehensive internal and external audit program. Jones served as Chair of AASHTO's Subcommittee on Internal/External Audit, leading the effort to make a comprehensive revision to the AASHTO Uniform Audit & Accounting Guide, and was a member of the technical panel for the National Highway Institute's development of the Audit Guide training courses.

Presenters subject to change



Mysteries of the FAR Revealed: Using the AASHTO Audit Guide

Curriculum Summary

COURSE 1 –

Indirect Cost Rates: Development

- Employing appropriate requirements, concepts, and tools necessary to develop and apply indirect cost rates to A/E contracts.
- Describing the required components of compliant internal controls.
- Preparing an appropriate analysis necessary to demonstrate the reasonableness of compensation.
- Interpreting and applying Federal and State laws, regulations, policies and procedures.
- Explaining various components of the external oversight framework including ethics, dispute resolution, and the FHWA function.
- Comparing and distinguishing between contract types and implications on account costing and billing.

COURSE 2–

Indirect Cost Rates: Auditing and Oversight

- Performing audit functions related to the planning, performance, or oversight of A/E consultant indirect cost rate audits.
- Determining and attesting to A/E consultant compliance with applicable guidance and/or requirements.
- Discussing how State DOTs will use the CPA Workpaper Review Program (AASHTO Audit Guide Appendix A) to evaluate audits performed by CPAs.
- Identifying and applying appropriate audit tools and techniques as specified in the AASHTO Audit Guide.
- Describing the components of a complete audit report and how to evaluate the report presentation.
- Assessing various components of the State DOT's oversight and risk management framework.
- Reviewing the FHWA's roles and responsibilities in its stewardship and oversight of Federal-Aid funds related to procurement of A/E design services and administration of related agreements.



Mysteries of the FAR Revealed: Using the AASHTO Audit Guide — *Actionable Steps and Course Takeaways*

When completed, attendees will have learned how to:

- Promote a uniform interpretation and consistent application of Federal Acquisition Regulations (FAR) in A/E Contracting
- Increase compliance with federal rules and regulations governing audits of A/E contracts
- Improve the quality of overhead cost rate audits
- Use audit information in A/E contract procurement and administration
- Understand and adopt an appropriate risk management framework

REGISTER TODAY!

Visit: <http://bit.do/aashtotx2017-1>

<http://bit.do/aashtotx2017-2>

or complete and fax/mail Registration Form.

REGISTER TODAY!

Mysteries of the FAR Revealed: Using the AASHTO Audit Guide A Two-Part Series

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— Please type or print all information below —

Individual Attendee Information

(For multiple attendees, please attach separate copies of this form.)

Name: _____ Title: _____

Name for Badge: _____

Organization: _____

Address: _____

City: _____ State: _____ Zip: _____

Office Phone: _____ FAX: _____

E-mail: _____

Payment Options:

Pay by CREDIT CARD:

☐ American Express® ☐ VISA® ☐ MasterCard® ☐ Discover®

Card number: _____ Expiration Date: _____

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Pay by CHECK:

Please make check payable to ACEC/Education Programs and send with this completed form to:

**American Council of Engineering Companies
Attn: Business Resources & Education
1015 15th St., NW, 8th Floor
Washington, DC 20005-2605**

Or FAX to 202-789-7220 (secure)

Location:

**AECOM
9400 Amberglen Boulevard
Austin, TX 78729**

Attendees Summary by Course:

COURSE 1 • October 2-3, 2017

Indirect Cost Rates: Development

Private Sector Attendees: ____ at \$795 = \$ ____

Public Sector Attendees: ____ at \$495 = \$ ____

COURSE 2 • October 4-5, 2017

Indirect Cost Rates: Auditing and Oversight

Private Sector Attendees: ____ at \$795 = \$ ____

Public Sector Attendees: ____ at \$495 = \$ ____

Sub Totals:

____ at \$495 = \$ ____

____ at \$795 = \$ ____

Total number of registrants: _____

Total Fees: \$ _____

Hotel Information

There are several nearby Austin hotels to choose from. The nearest hotels to AECOM location are: Comfort Suites, 13681 N. Highway 183 (512-219-1800) and Holiday Inn Express Hotel & Suites, 12703 Ranch Road 620 N. (512-249-8166). Please call hotels directly for reservations.

Refunds, Credits, Substitutions and Cancellations

For cancellations received by ACEC at least 30 days before the program date, ACEC will issue a full refund of registration fees, less a \$100 administration fee. For cancellations received by ACEC between 29 and 15 days before the program date, ACEC will issue credits toward future ACEC education seminars. Credits are valid for six months toward any ACEC course. For cancellations received by ACEC 15 days or less before a program date, ACEC will issue no refunds or credits. In addition, ACEC will issue no refunds or credits for "no-shows." Substitute attendee registrations may be made at any time.

FOR ADDITIONAL INFORMATION:

Visit www.acec.org, e-mail to Education@acec.org, or call 202-347-7474, ext. 338.