



SESSION 1 OF 4

Getting Started Right

Understanding Your Funding Award



SESSION 1

Learning Objectives

By the end of this session, you will be able to:

- 1 Identify the five essential sections of a funding agreement**
- 2 Apply the six-question cost eligibility test from 2 CFR 200**
- 3 Build a compliance calendar with essential tracking elements**
- 4 Recognize capacity-building funding opportunities for communities**

FOUNDATIONS

PM Foundations: The Rural Reality

Triple Constraint

Scope, time, and cost are interconnected. Change one, you affect the others.

Document Everything

If it isn't documented, it didn't happen. Keep records of decisions and approvals.

Communicate Early & Often

Problems get bigger when hidden. Share challenges with your program manager.

THE RURAL REALITY

Small staff. Many hats. Limited resources. These principles matter more — not less — when capacity is tight.

FUNDING AGREEMENT

Anatomy of Your Funding Agreement

Every funding agreement contains five essential sections:

1

Scope

What activities are eligible? What can and cannot be funded?

2

Timeline

Start date, end date, period of performance

3

Budget

Line items, categories, match requirements

4

Special Conditions

Davis-Bacon, BABA, NEPA, unique requirements

5

Reporting

Due dates, formats, submission requirements

REMEMBER: Your budget is a binding commitment. Changes require prior approval.

COST ELIGIBILITY

Six-Question Cost Eligibility Test

Per 2 CFR 200, every cost must pass ALL six questions:

- 1 Necessary and reasonable?
- 2 Allocable? Does it directly benefit this project?
- 3 Allowed? Check your funding agreement
- 4 Consistent? Same treatment for all sources?
- 5 Documented? Have supporting records?
- 6 Not charged elsewhere? No double-dipping

THE RULE

If ANY answer is NO, the cost is NOT eligible. *When in doubt, ask first.*

COST ELIGIBILITY

Always Ineligible Costs

NEVER ELIGIBLE UNDER FEDERAL AWARDS

- X Alcohol and entertainment
- X Lobbying and political activities
- X Bad debts
- X Fines and penalties
- X Contingency funds
- X Fundraising costs

PRE-AWARD COSTS

Costs before your award start date are NOT eligible unless specifically authorized in writing.

POST-AWARD COSTS

Costs after your period of performance ends are NOT eligible. No exceptions.

Remember: When in doubt, ask BEFORE you spend.

ACTIVITY: MIN SPECS

What must absolutely be in your compliance calendar?

How it works:

- 1 Brainstorm** Individual brainstorm — 2 minutes. List what must be in your calendar.
- 2 Share** Chat waterfall — drop your ideas in the chat together.
- 3 Consensus** Group consensus on the non-negotiables every project needs.

WHY THIS ACTIVITY? You know your projects best. Together, we'll identify what's essential for your success.

Essential Compliance Calendar Elements

✓ **Project Dates**

Start date, end date, and critical milestones

✓ **Amendment Deadlines**

Last date for budget or scope changes

✓ **Progress Reports**

Quarterly or as specified in your agreement

✓ **Closeout Requirements**

Final report submission, record retention

✓ **Financial Reports**

Reimbursement deadlines and documentation

✓ **Special Condition Dates**

Environmental review, certifications, unique requirements

FUNDING

Capacity-Building Funding Opportunities

Program	Best Fit For	Award Size	Cycle
USDA RCDI	Capacity-building for nonprofits & public bodies serving rural areas (pop. < 50,000)	\$50K–\$500K; 1:1 match	Watch FY2026 NOFO
EDA Planning & Local TA	Flexible support for economic development & infrastructure planning	\$100K–\$500K	Rolling
Oregon Main Street	Downtown revitalization TA; Revitalization Grant funds building projects (50% rural)	Grant up to \$400K	Network rolling; grant cyclical
ODOT Rural Programs	Transportation planning and capacity-building for rural communities	Varies	Contact ODOT region

TIP: These programs help communities build the staff, systems, and skills to manage infrastructure projects. Ask your OBDD program manager.

WRAP-UP

Three Things to Remember

1

Your funding agreement is your roadmap

Read it before you start. Refer to it often. Keep it accessible.

2

Ask before you spend

When in doubt, contact your program manager. It's easier to ask than to explain later.

3

Build your compliance calendar now

Track deadlines from day one. Missing a deadline can jeopardize your project.

BEFORE YOU GO

We want your feedback

Please take 3 minutes to send a quick email to help us improve future sessions.

Email to: Tiffany@CAPContractAlliance.com **Subject:** Session 1 Feedback

Rate on a scale of 1–5:

- 1 How relevant was today's content to your current work?
- 2 How confident do you feel applying what you learned today?
- 3 How likely are you to recommend this training to a colleague?

In your own words:

- What was the most useful takeaway from today's session?
- What topic would you like us to spend more time on in future sessions?

Your feedback helps us adapt future trainings to better serve Oregon communities.

Q&A

We have 30 minutes for Q&A and discussion

NEXT SESSION: Keeping Control: Scope, Schedule & Budget — Thursday, March 26, 2026

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