FY – 2015 Professional Skills & Technical Training Course Catalog

Office of Learning and Workforce Development

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**Please Contact the Professional Skills Team by use ProfessionalSkills@hq.doe.gov**

**Supervisory and Leadership Courses**

# Supervisory Essentials: Strategies for Successful

This course is designed to assist new first-line supervisors in developing the competencies they need to achieve their primary responsibilities, which include accomplishing the goals of their units through the work of their employees and ensuring that the work of their employees is of the highest possible quality. The course can also serve as a refresher for experienced supervisors and managers. This course addresses competencies in the following Executive Core Qualifications: Leading People, Leading Change, Building Coalitions, and Communication.

The goal of this course is to help participants acquire skills that enable them to develop strategies for addressing the challenges of making the transition from employee to supervisor or manager. Participants examine leadership practices and situational leadership theory; practice the stages of team development; and identify ways for building trust and cooperation on teams. In addition, approaches to resolving conflict and techniques for collaboration and reaching consensus are discussed. Participants create a personal action plan to help guide them apply the skills learned from the course to their jobs.

**Target Participants:** This course is mandatory for newly appointed DOE first-level supervisors required to take 40 hours of supervisory training during the probation period. Experienced supervisors and managers are encouraged to attend this course as a refresher.

**Course Length:** 4 days **(CLIN-SLDC-01)**

# Navigating the Federal Hiring Process

The purpose of this course is to provide new supervisors with an overview of the Federal hiring process, and an understanding of the goals of the streamlined Federal hiring initiative. In particular, the focus of the course is on the role and responsibilities supervisors have in the hiring process and how to most effectively partner with human resources specialists to hire the best candidates. In this introductory course, participants learn about the types of information that they need to provide to their human resources partners and the options that are available to them in the hiring process. Participants are introduced to the specific laws, regulations, and Department policies that apply to Federal hiring processes, and learn the steps in conducting a job analysis which serves as a fundamental source of information required throughout the hiring process. Participants also learn how to develop experiential and situational interview questions, and tips for conducting an effective selection interview. Participants create a personal action plan to help guide them apply the skills learned from the course to their jobs.

**Target Participants:** This course is mandatory for newly appointed DOE first-level supervisors required to take 40 hours of supervisory training during the probation period. Experienced supervisors and managers are encouraged to attend this course as a refresher.

**Course Length:** 1 day **(CLIN-SLDC-02)**

# Strategies and Tips for Recruiting Talent

This course is designed to provide managers, supervisors, and team leaders with a working knowledge of human resources (HR) management. The course focuses on the management functions of planning, organizing, directing, and controlling the day-to-day operations for managing the work of DOE Federal employees. Course content includes supervisory/managerial responsibilities in position management and classification, staffing, employee development, employee relations, equal employment opportunity and diversity, and labor management relations. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to attend this course to meet the 8-hour annual refresher training requirement. Also appropriate for professionals interested in human resource management.

**Course Length:** 3 days **(CLIN-SLDC-03)**

# Is Supervision for You?

The bottom line for all organizations is to get results, achieve the mission, and work effectively toward the vision set by top management. This course shows those in the middle of the management ladder how to develop the skills to achieve all of these goals. The course helps participants think and work differently to become a more effective manager, influencer, relationship-builder, persuader, delegator, and advisor who can be trusted to move people and the agenda along. This course’s highly participatory class on managing from the middle lays the groundwork for being more effective and workshops the skills required to get better results from teams, bosses, and subordinates. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers are encouraged to take this course to meet the 8-hour annual refresher training requirement.

**Course Length:** 1-2 days **(CLIN-SLDC-04)**

*\*Course length may be tailored.*

# Managing Up, Down and Across To Get Results

The bottom line for all organizations is to get results, achieve the mission, and work effectively toward the vision set by top management. This course shows those in the middle of the management ladder how to develop the skills to achieve all of these goals. The course helps participants think and work differently to become a more effective manager, influencer, relationship-builder, persuader, delegator, and advisor who can be trusted to move people and the agenda along. This course’s highly participatory class on managing from the middle lays the groundwork for being more effective and workshops the skills required to get better results from teams, bosses, and subordinates. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers are encouraged to take this course to meet the 8-hour annual refresher training requirement.

**Course Length:** 1-2 days **(CLIN-SLDC-06)**

*\*Course length may be tailored. The longer course will provide more in-depth discussion.*

**Delegation: Developing Others through Shared Work**

Effective delegation is one of the most powerful tools for leading and directing the work of others. When used appropriately, delegation allows managers to strategically allocate workload while providing challenging developmental assignments for their staff. This workshop shows participants how to design delegation plans for their team. It covers some of the common myths and misconceptions about delegating work to others and shows how good delegation is customized to the needs and abilities of individual employees. Managers who effectively delegate not only distribute work more effectively, but also grow the self-confidence and sense of achievement in their staff. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement. Also appropriate for those who directly or indirectly manage others, especially those who provide direction and leadership to staff without direct reporting authority, such as team leaders or matrix managers.

**Course Length:** 1 day **(CLIN-SLDC-07)**

**BUILDING AND MANAGING EFFECTIVE TEAMS**

In today’s collaborative business environment effective teams are essential to organizational success. Through a combination of games, role-plays, discussion, and case-studies participants will examine the characteristics of high-performing teams and the stages of team development. Participants learn how to staff teams, assign tasks, and diagnose and practice communication techniques to handle a variety of team problems. Strategies for enhancing team member cooperation, as well as critical analysis necessary for problem solving and decision-making are introduced. Upon completion of this workshop, participants are able to identify the characteristics of high performing teams, recognize the four developmental stages of teams, and identify appropriate strategies for leaders at each stage. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

**Course Length:** 1-2 days **(CLIN-SLDC-08)***\*Course length may be tailored.*

**Everyone is a Leader**

In this course, participants explore applying leadership principles to their current role – no matter the job level. Participants learn to differentiate between leadership and management; learn effective followership characteristics; and learn how to identify leadership opportunities. The course also examines interpersonal communication topics such as managing conflict, understanding emotional intelligence, and respecting diversity. Participants leave the course with a personalized leadership skills development plan.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

**Course Length:** 1 day **(CLIN-SLDC-09)**

**Developing Strength-Based Leadership**

Learn the advantages of leading and leveraging strengths-based teams. In this interactive workshop, participants identify their own talents and develop strategies to leverage team talents. This workshop is based upon Gallup’s extensive research findings that indicate people who work from their strengths are happier, more engaged in their work, and are more productive. Each participant will complete the Gallup Strength Finder assessment prior to the workshop. During the workshop participants develop individual and team action plans and prepare to apply their strength-based leadership skills in their day to-day working environment. Upon completing the workshop each participant receives the bestselling book *Strength-Based Leadership.* This facilitated workshop may also be used as a teambuilding opportunity with intact teams. Participants create a personal action plan to help them apply the skills

learned from the course to their jobs.

**Target Participants**: Professionals seeking to advance leadership skills and optimize teams.

**Course Length:** 1 day **(CLIN-SLDC-10)**

**Leading Teams and Projects**

This two day course assists participants in defining, managing, and executing leadership responsibilities within the context of being a team or project lead. Whether officially named team leader or if positioned within the role unofficially, participants learn key traits and actions that lead to successful leadership. Topics that are discussed in this course include the differences between teams and projects, personal leadership styles and its implementation, change management, facilitation skills, and motivation techniques. Participants use an assessment tool to examine their own approaches to projects and teams. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Professionals interested in leading teams.

**Course Length:** 2 days **(CLIN-SLDC-11)**

Coaching 24/7**CHING 24/7 COACHING**

Developing coaching skills is a key leadership competency for government managers.

Hundreds of leaders have benefitted from one-on-one leadership coaching over the past decade. Now, recent survey results demonstrate that using coaching skills in day-to-day interactions has a positive impact on employee communication and motivation. In fact, some managers who have taken the 24/7 Coaching® course report that using coaching skills ends up saving them time in the long run because employees begin to solve their own problems rather than running to their managers. As a manager you are expected to develop your “soft” skills, but there are few behaviorally based training programs to help you get there. In this workshop, participants learn when and how to use specific coaching skills in their everyday work to improve their professional relationships, and increase direct reports’ engagement and productivity. Participants also learn when it is more effective to be a coach rather than

a “director” or “manager”. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to attend this course to meet the 8-hour annual refresher training requirement. Also appropriate for professionals interested in coaching.

**Course Length:** 2 days **(CLIN-SLDC-12)**

# Servant Leadership

Servant leadership is a practical philosophy developed by Robert Greenleaf, which supports people who choose to serve first, and then lead as a way of expanding service to individuals and institutions. Servant leaders may or may not hold formal leadership positions. Servant leadership encourages collaboration, trust, foresight, listening, and the ethical use of power and empowerment. This course fosters examination of organizational values and gives participants a chance to practice the principles of Servant Leadership. Additionally, participants examine and discuss the concept of good followership. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Professionals who want a better understanding of leadership.

**Course Length:** 2 days **(CLIN-SLDC-13)**

# Leadership Skills for Non-Supervisors

Federal employees who aspire to become managers and supervisors in the future rarely get the

leadership training necessary to prepare them for a promotion. It is important to groom high-potential employees for positions of leadership by training them early. To facilitate good succession planning, this course helps future managers and supervisors with the skills that they’ll be called on to utilize as they move up the ranks such as decision making, effective communication, delegation techniques, and leadership behaviors. By the end of this two- or three-day session, non-supervisors increase their knowledge and skills in areas that will prepare them to lead into the future with confidence and professionalism. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Professionals who aspires to a position of leadership. This course is ideal for those who have been identified by current management as potential managers or supervisors.

**Course Length:** 2-3 days **(CLIN-SLDC-14)***\*Course length may be tailored.* **(CLIN-SLDC-01)R(CLIN-SLDC-01)VISORS**

# Performance Management for Supervisors

This course is designed to equip managers, supervisors, and team leaders with key concepts, sound practices, and practical tools and techniques for managing the performance of their employees. Supervisors must expand and grow employee skills, and help prepare themselves and their employees to meet the mission and goals of the organization. Performance Management is a key factor in creating a capable and adaptable workforce. Using exercises and discussion, the course covers the phases of performance management process: Planning, Monitoring, Developing, Rating, and Rewarding. Participants practice setting expectations and providing effective feedback. Facilitators use the Department’s performance management system as the basis of the course. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

**Course Length:** 1 day **(CLIN-SLDC-29)**

# Performance Management Check-In for Senior Managers and Executives

This course is designed to equip senior leaders with techniques to apply performance management as a key driver toward building and sustaining high performance within their organizations. Performance goals and measures are an effective way to communicate the organization’s priorities, deploy resources, delegate authority, and define accountability to ensure the mission is met. Research demonstrates that communicating priorities and goals stimulates employee engagement and builds momentum toward higher performance. This course covers: strategically applying the fundamentals of performance management to build a more effective leadership team; setting the standards for performance management throughout the immediate organization; identifying the attributes of effective performance planning; providing effective feedback, and describing and modeling the behaviors in an organization. Participants create a personal action plan to help them apply the skills learned from the

course to their jobs.

**Target Participants:** Experienced managers may wish to take this course to meet part of their 8-hour annual refresher training requirement.

**Course Length:** 0.5 days **(CLIN-SLDC-15)**

# Writing Performance Objectives

**cc PERFORMANCE OBJECTIVES**

This course provides the opportunity for supervisors and managers to write performance objectives or performance standards based on the department’s performance management system. The course covers the benefits of setting expectations, aligning with organization mission, goals and objectives, writing clear performance expectations based on the SMART model, communicating expectations to employees, and holding themselves and employees accountable. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

**Course Length:** 2 days **(CLIN-SLDC-16)**

# Identifying and Closing Performance GAPS

An integral part of performance management is establishing accountability for individual and

organization performance at all levels, from individual employees to senior leaders. Employees are held accountable for results; and supervisors and managers are accountable for their guidance and direction of their work units. This course covers the work needed to support the mission and goals of the organization; inventorying the competencies and skills of the work unit to determine gaps; developing workable strategies for closing performance gaps; developing communication strategies for ensuring understanding of performance expectations and accountability; and, describing the organization infrastructure for supporting performance. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

**Course Length:** 1 day **(CLIN-SLDC-17)**

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**OACHING FOR PERFORMANCE CONVERSATIONS**

# Coaching for Performance Conversations

Organizations of all sizes and stripes are focusing on how the implementation of new performance systems, including complex multi-tiered systems, affects the way in which managers and their employees plan for, monitor, evaluate, and reward performance. An important component of this process involves quarterly coaching sessions between managers and employees to discuss performance. For the sessions to be worthwhile, both managers and employees should know what to expect and then how to execute an effective coaching session. This course covers how to make the best use of these sessions by teaching how to prepare for the sessions, how to give and receive feedback, how to communicate your wants and needs, how to ask better questions and listen strategically, how to praise, give guidance, and administer advice. This course is a comprehensive roadmap for any organization whose current performance planning and coaching sessions are going nowhere. It is ideal for managers

only, employees only (*How to Receive Coaching*), or a mixed group. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

**Course Length:** 1-2 days **(CLIN-SLDC-18)**

*\*Course length may be tailored.*

# Leadership through Effective Communication

**LEADERSHIP THROUGH EFFECTIVE COMMUNICATION**

This course is a highly interactive session focused on developing powerful communication skills to lead people and manage projects. The course emphasizes personal communications preferences and the impacts of these preferences on others, and provides tips and techniques for maximizing effectiveness in leading project teams. Skills-based lessons include the use of different communications styles, managing conflict, giving and receiving feedback, and applying appropriate decision-making techniques. The course provides a practical and effective toolkit for communicating in a project-focused environment, and a resource list for continuous learning.

**Target Participants:** Prospective Level 2 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 2 core course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days **(CLIN-SLDC-19)**

# Clear Communication Skills for Managers and Supervisors

Good communication skills are an essential tool in the toolkit of a successful manager, and this program can help improve these skills. This intensive workshop provides guidance on advanced-level communications skills specifically for those who manage and direct others. Not only will participants be provided with concrete skill-building tools, but they will also learn strategies to enhance their oral and written communications. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to attend this course to meet the 8-hour annual refresher training requirement.

**Course Length:** 2 days **(CLIN-SLDC-20)MS**

# Executive Communications

Executive Communications is designed to provide DOE participants with high-level communication skills to address issues/activities of specific importance to internal, public, media, and congressional audiences. The course addresses how to engage different audiences depending on their needs and interests, create effective messages, and improve delivery skills for a variety of formats including print media, TV, and panel discussions. During this training program, two Executive Communication Coaches offer key techniques through interactive modules and video practice to help DOE participants deliver successful presentations, media interviews, and congressional testimony or briefings. DOE participants are encouraged to share their experiences as senior-level managers who have been involved in the project management process. The objective of this course is to help each DOE participant enhance their current communication knowledge to effectively communicate powerful, positive messages to target

audiences.

**Target Participants:** Prospective Level 3 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 3 core course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days **(CLIN-SLDC-23)**

# Change and Transition Management

The speed of research and development, information sharing and knowledge management requires that organizations keep in constant motion, changing processes and people almost incessantly. Rather than focus on “managing” change, this workshop shows participants how to harness the energy and excitement of the new to accelerate achievement and results. This course helps participants increase their capacity to assess the outcomes of proposed changes, build organizational support, develop plans to manage transitions, and assess the effectiveness of both transition and change. It is designed to encourage best practice leadership behaviors and addresses in multiple lessons the Executive Core Qualifications (ECQs) of leading change, results driven, business acumen, building coalitions, and fundamental competencies. Topics include: Fundamentals of Change and Transition, Validating the Need for Change – Building the Business Case, Planning the Transition: Developing the Action Plan, Implementing and Monitoring Transition Activities and Assessing the Success of Change and Transition.

The majority of the class time is spent in discussion, reflection, hands-on, and action-learning activities resulting in successful leaders who demonstrate both the ability to envision, market, and implement changes and the ability to assume ownership and implement changes designed by others. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement. Also appropriate for managers and senior leaders responsible for leading change initiatives or transitions.

**Course Length:** 1-3 days **(CLIN-SLDC-21)** - *\*Course length may be tailored.*

# Managing a Virtual Workforce Making Telework Work

With more and more employees taking advantage of workforce flexibilities such as telework and

alternative work schedules, much of today’s work is done in a virtual environment. Supervisors and employees need to have the skills and tools to productively work in this new operating environment. This course provides supervisors and managers with practical tips and advice for managing a remote workforce, and provides employees who telework with tips for effectively engaging with their supervisors, colleagues, and customers. The course discusses challenges associated with working in a virtual environment, including communications, networking, technology and management challenges. Participants also examine their own personal biases and underlying personal fears and concerns. Participants learn tips and techniques for setting clear expectations and managing remote staff effectively; collaborating in a virtual environment; and communicating effectively with supervisors, employees, and customers. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement. Especially appropriate for supervisors managing remote workers and employees wishing to take advantage of telework.

**Course Length:** 1 day **(CLIN-SLDC-24)**

# Dealing with Difficult People

This program prepares participants to effectively manage conflict and negative work situations with a minimum of fallout. In this course, participants learn to diffuse anger, prevent unnecessary miscommunication and conflict, and improve personal relationships with colleagues, partners and vendors. Some of the topics covered include: identifying types of difficult behavior, understanding why these behaviors may be displayed, developing self-awareness of how one reacts to difficult people, practicing behavioral interventions, and knowing the difference between a behavior problem and a personnel problem. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

**Course Length:** 1-2 days **(CLIN-SLDC-25)** - *\*Course length may be tailored.*

# Facilitating Conflict Resolution

This course covers a variety of topics specific to the issues of facilitation of conflict resolution. Areas discussed include: recognizing potential conflict situations and neutralizing them before they escalate; using problem-solving and decision-making techniques to meet the needs of everyone affected; negotiating "win-win" solutions for all parties involved; and minimizing or resolving conflict in groups and between employees using appropriate interpersonal strategies. The course includes a significant emphasis on the use of facilitation techniques within the conflict resolution process.

**Target Participants:** Prospective Level 3 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 3 elective course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days **(CLIN-SLDC-26)**   **(CLIN-S(CLIN-SLDC-01)LDC-01)AND TECHNIQUES**

# Negotiation Strategies and Techniques

This course is presented in a workshop format in which participants learn about collaborative and competitive negotiations, negotiation strategy and planning, negotiations within and between teams, identifying key stakeholder interests in negotiations, determining best alternatives to negotiated agreements, responding to conflict, and creating trust. The objective of this course is to provide participants with methods and strategies that improve their performance in negotiating agreements. Participants then practice using learned strategies during the course. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Prospective Level 3 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 3 elective course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days **(CLIN-SLDC-27)**

**TURNING THE TABLES ON CONFLICT**

# Turning the Tables on Conflict

This course prepares participants to take on “problem” people, conflict, and negative work situations with a minimum of fallout. Participants learn to diffuse anger, prevent unnecessary miscommunication and conflict, and improve personal relationships with colleagues, partners, and vendors. Participants create a personal action plan to help guide them in applying the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

**Course Length:** 1- 2 days **(CLIN-SLDC-28)** - *\*Course length may be tailored.* **RELATIONS**

# Labor Management Relation

This course provides participants with a basic overview of labor management relations. Participants learn about labor laws and regulations, implementing bargaining practices, and applying methods for resolving disputes. Additionally, the course covers the Federal labor relations program, working with unions and unionized employees, and guidance on contract interpretation.

**Target Participants:** Prospective Level 3 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 3 elective course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days **(CLIN-SLDC-30)**

# Best Negotiating Practices: Creating and Capturing Value As You Negotiate

This workshop identifies and develops the negotiating and bargaining skills necessary for today’s global, dynamic business environment. Business professionals, government executives, and attorneys must be able to effectively negotiate agreement when budgets, performance standards, priorities, relationships, and due dates are at stake in order to meet and exceed established organizational goals. Attendees will thoroughly explore and learn “real world” negotiation techniques critical to today’s decision making process and improved performance. The course focuses on learning from shared experiences of your colleagues, practicing your skills in increasingly demanding negotiations, and producing repeatable, predictable results in your negotiations. Key modules are bargaining, preparation, and information exchange and validation, with a focus on the most critical Best Negotiating Practices®. Participants create a personal action plan to help guide them in applying the skills learned from the course to their

jobs.

**Target Participants:** Program and project managers, acquisition specialists, procurement, contracting officers, executives, and supervisors.

**Course Length:** 1-2 days **(CLIN-SLDC-31)** - *\*Course length may be tailored.*

**Introduction to HR for Managers, Supervisors and Team Leaders**

This course is designed to provide managers, supervisors, and team leaders with a working knowledge of human resources (HR) management. The course focuses on the management functions of planning, organizing, directing, and controlling the day-to-day operations for managing the work of DOE Federal employees. Course content includes supervisory/managerial responsibilities in position management and classification, staffing, employee development, employee relations, equal employment opportunity and diversity, and labor management relations. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to attend this course to meet the 8-hour annual refresher training requirement. Also appropriate for professionals interested in human resource management.

**Course Length:** 3 days **(CLIN-SLDC-05)**

# Techniques for Managing the Multi-Generational Mix

This course sets the foundation for a clearer understanding of the characteristics of the five generational groups currently represented in the workplace and how managers can use a working knowledge of their differences to be more effective at getting the mission of the organization accomplished. Even non-managers will benefit through greater awareness and understanding of what makes their peers and their managers “tick”. Participants learn do’s and don’ts of working with each group, examine common assumptions groups have about each other, and how to enhance communication to best leverage the strengths of each group. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement. Highly recommended for supervisors, managers, and team leads who manage multi-generational work teams.

**Course Length:** 1-2 days **(CLIN-SLDC-32)** - *\*Course length may be tailored.*

# Strategic Thinking

This course conducts a series of interactive, hands-on, one-day workshops that will identify the critical elements of strategic thinking, help individuals assess their ability to think strategically, and provide practical tools and techniques to apply strategic thinking skills to their daily work. Participants leave the workshop with a personal application plan including measures of success. A follow-up group work session will assess individual (and team) progress against the benchmarks of their action plans, and provide additional strategic thinking and implementation tools to accelerate progress in the future.

**Target Participants:** Professionals interested in learning more about elements of strategic thinking.

**Course Length:** 2 days **(CLIN-SLDC-33)**

# Workforce Planning for Managers and Supervisors

This course provides supervisors and managers with tools to address their day-to-day workforce

planning responsibilities. The goal of workforce planning is to have employees with the right skills to meet the goals and objectives of the organization and the Department of Energy (DOE).

The course provides the basic principles of workforce planning as well as practical, real-world solutions applicable to DOE. Best practices used by both private and public sector organizations are also provided for the participants. This course uses a variety of training methods including individual and group work assignments, group discussions, exercises, and instructor-led training.

**Target Participants:** Experienced supervisors and managers may wish to attend this course to meet the 8-hour annual refresher training requirement. Also appropriate for professionals interested in workforce planning.

**Course Length:** 3 days **(CLIN-SLDC-34)**

# Successful Mentoring Skills

Successful mentoring programs encourage relationships that support the learning and development of targeted employee populations. Mentoring is an important component of an effective succession strategy. Effective mentoring requires commitment and the development of a specific skill set. This course provides the skills necessary to mentor effectively so as to produce rapid improvement and lasting results. Some of these skills include: creating an effective protégé/mentor relationship, managing expectations, evaluating strengths and weaknesses, and providing reinforcement or corrective feedback for positive development. Participants create a personal action plan to help them apply the skills learned

from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this to meet the 8-hour annual refresher training requirement.

**Course Length:** 1-2 days **(CLIN-SLDC-35)** **CHMARKING**

# Understanding Benchmarking

Benchmarking provides a comparative analysis of an organization’s activities to “Best Practices” in world class organizations. This program covers the fundamentals of benchmarking practice, including the Five W’s – who, what, when, where and why, and the how-to. It is designed to tailor discussions and exercises directly to organizations’ operating in the most complex financial environment in existence in the world today - the internal financial operations of the U.S. government. It trains participants in the terminology, techniques, approaches, and issues related to successful benchmarking projects. It also familiarizes participants with available resources to assist in successful benchmarking activities and OMB A-76.

**Target Participants:** Executives who seek to improve organizational performance and discover how to model best practices of top organizations. Financial managers looking to maximize organizational efficiency.

**Course Length:** 1-2 days **(CLIN-SLDC-36)** - *\*Course length may be tailored.*

**Personal Development Topics**

# TrustWorthy Customer Service

In this interactive course, participants learn how to improve their customer service skills to build

stronger and more effective relationships with customers, and to improve their overall individual and organizational effectiveness. Participants learn how to identify customers and their needs, and learn the fundamental attributes of strong customer service skills. The course uses a series of mini case studies and individual assessments to help participants focus on the steps they need to take to provide exceptional customer service. Participants receive a set of practical tips and techniques that they can apply immediately to their current projects. At the end of the course participants leave with a personal development plan to further enhance their consulting customer service skills while on the job. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course will be of interest to any professional wishing to improve their customer service skills.

**Course Length:** 2 days **(CLIN-PDC-01)**

**Crucial Conversations**

The course would provide participants skills for creating alignment and agreement by fostering open dialogue around high-stakes, emotional, or risky topics-at all levels.

By learning how to speak and be heard (and encouraging others to do the same), participants will begin to surface the best ideas, make the highest-quality decisions,

and the act on their decisions with unity and commitment.

The training will equip participants with a straightforward step-by-step process for identifying and resolving performance gaps, those unpleasant realities standing in the

Way of organizational success.  With a hands-on problem-solving approach, participants learn to enhance accountability, improve performance, and ensure execution.

**Target Participants:** This course will be of interest to any professional wishing to improve their customer service and commutation skills.

**Course Length:** 2 days **(CLIN-PDC-20)**

# Using Consulting Skills to Improve Individual and Organizational Performance

This course covers how to use consulting skills to create stronger partnerships with key customers and to enhance overall effectiveness as an internal consultant. Participants learn a systematic process for engaging in consulting assignments including steps for gaining a clear understanding of customer needs and expectations. Participants learn about, and then practice new consulting skills. As part of the course, participants work on a case study and receive a set of assignments to be completed in class that require them to apply consulting skills in their own work environment. They then report on their resulting experiences. Topics covered include managing the client relationship, gaining the information they need to create a solution that meets or exceeds customer expectations, applying project management skills in a consulting environment, leading teams in a consulting environment and developing effective recommendations. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course will be of interest to professionals who wish to employ consulting skills to improve their individual or organizational performance.

**Course Length:** 3 days **(CLIN-CD-14)**

# Critical Thinking Skills

Accelerated change, constant reorganization, and down-sizing are trends that place new demands on our ability to quickly judge and to make decisions. This course consists of highly interactive learning focused on the real-world skill of critical thinking. Critical thinking skills are focused on the organizational and individual challenges of the participants’ professional world. One of the elements of critical thinking is that “one size fits all” does not work. This course covers topics such as: measuring risk, applying systems thinking, and consensus building. All participants will be provided with a bibliography that includes works by Roger von Oech, Peter Senge, Margaret Wheatley, and other leaders in critical thinking and innovation. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Professional who wish to improve their critical thinking skills.

**Course Length:** 2 days **(CLIN-CD-15)**

# Creative Problem Solving

This course consists of highly interactive learning focused on real-world problem solving. Active learning will take place through simulations that connect content to participants’ world of work. Some of the topics covered include: unlocking mental blocks, creating safe environments for questions, applying systems thinking, solutions testing, and clarifying organizational values. This course is customized to meet the unique challenges of the participants. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Professionals, regardless of job description or organizational role, who seeks better, quicker solutions to workplace problems.

**Course Length:** 2 days **(CLIN-CD-16)**

# Making Meetings Work for Time-Crunched Executives

A recent survey of 38,000 workers worldwide found that workers consider ineffective meetings the primary “productivity pitfall” across every type of organization. In fact, employees spend an average of 5.6 hours per week in meetings, and 69 percent of that time is deemed to be ineffective. This course helps participants change the way they conduct meetings by teaching techniques for running and participating in meetings. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Professionals interested in improving the effectiveness of meetings.

**Course Length:** 1-2 days **(CLIN-CD-17)** - *\*Course length may be tailored.*

# Changing Dimensions of DOE

This course is designed to provide the participant with knowledge of DOE's changing priorities and provide an opportunity for active participation in DOE's future. Participants are provided access to key DOE organizational leaders and interact with the DOE leadership. Topics for the sessions include: managing for results in DOE; quality focus; environmental priorities; organizational initiatives; laboratory relationships; public policy process; Congressional policy perspectives; exploration of Capitol Hill; performance management; techniques for positive change in DOE; and developing action plans. Workshop includes: preparing for change, planning for change; and group feedback.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

**Course Length:** 4 days **(CLIN-CD-01)**

**ETHICS AND DECISION MAKING**

# Ethics and Decision Making

Ethics policies and procedures apply to all employees, so everyone needs to be conversant with the applicable regulations. This course presents the nature, sources, requirements of ethics provisions, and consequences for failure to comply in an informative, interesting, and relevant manner. The class focuses on understanding ethics-based concepts and systems, rights and responsibilities, individual compliance with ethics policies and procedures, and how to make ethical decisions. The approach is interactive and encourages questions. Each ethics program will be tailored to the individual organization and its relevant provisions. Participants create a personal action plan to help them apply the skillslearned from the course to their jobs.

**Target Participants:** Employees who are required to take ethics training or would benefit from a greater understanding of ethics policies and procedures.

**Course Length:** 1-2 days **(CLIN-CD-08)** - *\*Course length may be tailored.*

# Platform Skills – More Than Just Public Speaking

Verbal skills sometimes thought of as 'platform' skills play a key role in how leaders and managers are able to convey themselves effectively. This course teaches participants to express complex ideas and concepts in language and terms that are understandable by people who come from diverse backgrounds. Having polished communications skills, both verbal and written becomes increasingly important as persons advance their careers to higher levels in their organizations; this course allows participants of all career levels to practice platform skills and receive instructor and peer feedback for improving their effectiveness. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:**

Professionals interested in learning the basic principles of public speaking.

**Course Length:** 1 day **(CLIN-CD-02)**

# Business Writing

Most professionals are required to write as part of their job, but often find drafting, writing, and editing documents time-consuming and frustrating. The overriding goal of this course is to help experienced writers create and edit mistake-free business documents with greater clarity, economy, and speed. Participants learn to plan, organize, and structure documents for maximum effect, to determine the appropriate language, style, and tone for each document, to use clear and concise language, to avoid major grammatical errors, reduce the time spent preparing and writing documents, to proofread material and collaborate with others to create clear documents and basic punctuation, grammar, and spelling. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:**

Professionals interested in improving their business writing skills.

**Course Length:** 2 days **(CLIN-CD-07)**

**RSUASIVE LEGAL WRITING AND REASONING**

# Presentation Skills

The purpose of this workshop is to help participants learn how to develop and deliver high impact presentations. It covers the skills necessary to effectively design, develop, and deliver presentations. The first half-day consists of an overview for all participants of the ingredients necessary to deliver a winning presentation, including how to use a variety of communications styles, how to use audio-visual aids effectively, and other techniques. The course also presents the most common mistakes presenters make, strategies for addressing anxiety about public speaking, and strategies for engaging audiences. The remainder of the course is dedicated to practicing these skills. Participants design and deliver a fiveminute presentation. All participants are videotaped, critiqued and then given the opportunity to perform their presentation again. During the presentation, participants focus on minimizing their weaknesses and enhancing their strengths. Each participant gets a copy of the videotape to take home. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:**

Professionals interested in enhancing their presentation skills, including anyone who makes presentations for internal work situations, customers, or outside groups.

**Course Length:** 2-3 days **(CLIN-CD-03)-** *\*Course length may be tailored.*

# Facilitation Skills

This course is designed to prepare participants to facilitate meetings and group processes in a number of government settings, including: internal organizational meetings; cross-organizational meetings; and multi-stakeholder and public meetings. Roughly 50 percent of the class time is spent in exercises and discussions following up on exercises. All of the participants have an opportunity to be videotaped facilitating a mock meeting. Key topics include developing agendas for meeting and programs (multi-meeting engagements), ground rules for running effective meetings, managing difficult participants, voting models and their application in meetings, techniques for focusing discussions and building consensuses, facilitating brainstorming sessions, and focus groups. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Professionals wishing to improve their facilitation skills.

**Course Length:** 2 days **(CLIN-CD-04)**

# Facilitating Groups: The Active Facilitation Approach

The move toward more frequent use of groups and teams to accomplish goals has increased demand for skilled facilitators who can help such groups achieve optimal productivity. One method that has emerged and is utilized in this training is the Active Facilitation Approach. As the name implies, this method requires the facilitator to become engaged in the group’s processes. However, rather than become involved in the content of the group’s work, this method places the facilitator in a leadership role that has significant impact on the group’s effectiveness. Although designed for novice facilitators and those who have not yet facilitated a group, the information presented in this program can be helpful to experienced facilitators, whether or not they’ve ever applied the active facilitation approach. This session is useful for a wide range of group process settings, including business meetings, team meetings, retreats, work sessions, or other group meetings in which the goal is to make decisions and take action. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Professionals responsible for leading or facilitating groups, retreats, teams, or meetings.

**Course Length:** 1-2 days **(CLIN-CD-05)** - *\*Course length may be tailored.*

# Emotional Intelligence: Expanding Your Emotional Quotient

Emotional intelligence is knowledge of emotions and having the ability to sense, understand, and apply the power of emotions as a source of energy, information, and influence. This course focuses on knowing and understanding one’s own emotional quotient (EQ) and learning how to increase it. Participants learn how EQ affects how one deals with other people, how it plays into decision making processes, and what one can do with improved emotional intelligence to make the workplace more productive and enjoyable. The training is based on the work of Daniel Goleman, and it focuses on the skills of listening, self-awareness, understanding, decision making, and leadership. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to attend this course to meet the 8-hour annual refresher training requirement. Also appropriate for anyone who wishes to relate better to others, become a better listener and leader and increase confidence and selfesteem, especially in a team environment.

**Course Length:** 1-2 days **(CLIN-CD-12)**- *\*Course length may be tailored.*

# Get Along with Anyone, Anytime, Anywhere: Create Enduring Connections with Customers and Co-Workers

A cooperative spirit cultivates a culture that brings out the best in people and performance, keeping employees happy, energized, and productive. Good interpersonal communication skills boost the bottom line in many ways – by helping to retain employees, improve morale, “win over” customers, create a loyal following, secure repeat business, expand networks, and increase job satisfaction. This course teaches participants to increase their “social IQs”, give feedback in a positive manner, correctly use body language, and adapt communication styles to the situation. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Professionals wishing to improve communications and relationship building skills. Especially appropriate for those involved in customer service, leadership, supervision, and team building.

**Course Length:** 1-2 days **(CLIN-PDC-04)** - *\*Course length may be tailored.*

# Communications Skills in a Culturally Diverse Workplace

This workshop provides participants with tools to improve their interpersonal communication skills in a culturally diverse workplace. Through the use of video, short films, case studies, and interactive roleplaying, participants explore different kinds of communication strategies to interact more effectively with others in the work environment. They also gain insight into different communication styles and rituals and the implications for development of interpersonal and intercultural skills in the workplace. Emphasis is given to practical analysis of typical communication scenarios in the workplace. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to attend this course to meet the 8-hour annual refresher training requirement.

**Course Length:** 1-2 days **(CLIN-CD-13)** - *\*Course length may be tailored.* **DIVERSITY**

# Understanding, Recognizing and Valuing Diversity

This comprehensive workshop broadens participants’ understanding of diversity and diversity-related issues in the workplace. Emphasis is given to analysis of changing demographics and implications for meeting organizational goals and priorities in the future. More specific emphasis is given to cultivating a deeper and more profound appreciation for individual and group differences in order to facilitate optimum levels of interaction and performance in the work environment. Participants are both exposed to and engage in numerous activities to help them recognize, value, and manage diversity in the workplace. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement. Also appropriate for any professional who wants a better understanding of diversity.

**Course Length:** 1-3 days **(CLIN-CD-09)-** *\*Course length may be tailored.*

# Making Meeting Work for Time-Crunched Executives

A recent survey of 38,000 workers worldwide found that workers consider ineffective meetings the primary “productivity pitfall” across every type of organization. In fact, employees spend an average of 5.6 hours per week in meetings, and 69 percent of that time is deemed to be ineffective. This course helps participants change the way they conduct meetings by teaching techniques for running and participating in meetings. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Professionals interested in improving the effectiveness of meetings.

**Course Length:** 1-2 days **(CLIN-PDC02)***\*Course length may be tailored to suit participant needs.*

# Persuasive Legal Writing and Reasoning

This course is a fast-moving, thought-provoking writing program for attorneys, paralegal staff, and legal resource analysts. From the outset participants are engaged with easy-to-apply writing techniques designed to strengthen the clarity and persuasiveness of briefs, memoranda, correspondence, regulations, and other writing. Attorneys who complete this program earn CLE credits, and the program can be customized to meet the agency’s specific objectives or to address any legal specialization. The writing method presented in this workshop was developed from fifteen years of working with the most successful and demanding professional firms, federal agencies, and Fortune 500 Corporations, and bar associations. The result is a thoroughly researched and proven writing program that will empower busy law professionals to more effectively meet their communication challenges. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** Attorneys, paralegal staff, and legal resource analysts (LRAs) wishing to accelerate their writing and improve its effectiveness.

**Course Length:** 2 days **(CLIN-PDC03)**

# Stress Management for Effective, Satisfied Employees

Stress is our individual response to situations and circumstances. Determining a “right” or “wrong” response provides little value; understanding why we act and react the way we do provides tremendous value by offering the opportunity to change. This course focuses on awareness and new perspectives. Participants learn how we internally “manufacture” stress and how to maximize the benefits of stress while minimizing its negative impact. Participants learn to be healthier, happier, and more productive. The organization benefits with higher productivity, lower absenteeism and attrition, higher morale, and a more congenial atmosphere, which in turn, can attract more quality workers to the organization. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** All employees, managers and executives who suffer from stress, whose

organizations are stressful or who wish to develop a greater appreciation of stress and its effects on individuals and the workplace.

**Course Length:** 1-2 days **(CLIN-PDC-05)** - *\*Course length may be tailored.*

# Balance, Effectiveness and Professionalism

Balance is a state of dynamic equilibrium; it promotes effectiveness and professionalism. Balance has multiple components which make up an ever-changing basis of balance. This class begins with a look at the emotional, family, financial, fitness, health, intellectual, nutritional, professional, life purpose, social, spiritual, and stress aspects of balance. The course teaches techniques for maintaining balance, dealing with stress, and staying on track to achieve the balance participants want in life. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:** All employees, managers, and executives who want to improve balance in their own lives, or want to encourage those working with or for them to build balance in their lives.

**Course Length:** 1-3 days **(CLIN-CD-19)** - *\*Course length may be tailored.*

# FERS Retirement Seminar

This course is designed to stimulate positive thinking toward proper planning for post-retirement years. The course emphasizes advanced pre-retirement planning rather than specific retirement benefits. Topics covered by this course are FERS benefits, estate planning, financial planning, tax and legal issues, health and fitness or health considerations, social security benefits and Medicare, life after retirement and other retirement benefits such as health benefits, life insurance, and the Thrift Savings Plan.

**Target Participants:** FERS employees five years from retirement and their spouses.

**Course Length:** 3 days **(CLIN-RC-01)**

# CSRS Retirement Seminar

This course is designed to stimulate positive thinking toward proper planning for post retirement years. This course emphasizes advanced pre-retirement planning rather than specific retirement benefits. This seminar covers CSRS benefits, estate planning, financial planning, tax and legal issues, health considerations, social security benefits and Medicare, life after retirement and other retirement benefits such as health benefits, life insurance, and the Thrift Savings Plan.

**Target Participants:** Civil service employees five years from retirement and their spouses.

**Course Length:** 3 days **(CLIN-RC-02) (CLIN-RC-01) (CLIN-RC-01)A(CLIN-RC-01)FTER RETIRE(CLIN-RC-0ENT**

# Preparing for Life after Retirement

This practical, dynamic program helps participants identify goals, objectives, and next steps toward a new lifestyle. This course complements the FERS and CSRS pre-retirement seminars by helping those who are about to make what is arguably their biggest career move transition seamlessly into a new lifestyle filled with possibilities and opportunities. This course provides the tools needed to grow and thrive for those moving toward retirement. Participants learn goal setting, planning non-financial aspects of retirement, and managing time and interests.

**Target Participants:** Those who are near retirement and want to get the most out of the transition, especially employees who are uncertain about their transition.

**Course Length:** 1-2 days **(CLIN-RC-04)** - *\*Course length may be tailored.*

**Project Management Topics**

**PROJECT MANAGEMENT ESSENTIALS**

# Project Management Essentials

In this eight-week course, participants learn about the primary concepts of project management and are introduced to best practices in project management from DOE, other Federal agencies, and the private sector. This introductory course focuses on four major aspects of project management: The Discipline of Project Management, Project Planning, Teambuilding and Effective Leadership, and Project Execution. Based off the Project Management Institute’s Project Management Body of Knowledge (PMBOK® Guide) Fifth edition and J. Davidson Frame’s, The New Project Management, 2nd Edition, students will gain an understanding of how to apply this knowledge to their current projects, and identify ways to incorporate best practices. Various Federal guides and manuals will be referenced throughout the course. However, where specific examples of project management processes or policies are provided, the course will use relevant DOE examples. This course provides a “blended” learning environment over an eight week period – a combination of the traditional lecture, an intense on-site workshop, case studies, homework, and classroom discussions at regional sites provided through televideo. Although the course provides a familiarity level of the primary concepts of project management, subsequent course and work-related experience builds upon this to establish working and expert levels of project management ability. The course is presented at an intermediate level of expertise similar to what would be expected of an accredited graduate level college course.

**Target participants:** Prospective Level 1 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 8 weeks **(CLIN-PMC-01)**

# Project Risk Analysis and Management

This course is designed to prepare DOE project managers to: determine project risks and develop risk management and mitigation strategies; determine at which points in a project life cycle risk analyses should be performed; evaluate potential risk probability and consequences, determine risk factors; select risk management or mitigation strategies; and develop a risk management plan. Participants also acquire the skills that enable them to assign risk responsibility between DOE and contractors, determine appropriate project cost and schedule contingencies for identified risks, determine appropriate project management and controls tools to assist in managing identified risks, and evaluate project Estimates at Completion (EAC) and remaining contingencies to determine adequacy of funds.

**Target Participants:** Prospective Level 1 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days **(CLIN-PMC-03)AFETY IN PROJECT MANAGEMENT**

# Planning for Safety in Project Management

This course is designed to enhance the DOE Federal Project Director's ability to clearly define and carry out integrated safety management and quality management. Additionally, it provides participants with the necessary information to ensure that all DOE projects comply with DOE standards of safety. The main objective of this course is to prepare the participant to effectively apply safety management requirements throughout the project acquisition life cycle. Particular emphasis is given to the planning and design phases where application of a Failure Mode and Effects Analysis should identify potential hazards and mitigation strategies. Using a case study, this process examines nuclear, environmental and worker safety issues in a representative project.

**Target Participants**: Prospective Level 1 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3.5 days **(CLIN-PMC-04)**  **AN(CLIN-PMC-01)D REGULATIONS**

# Environmental Laws and Regulations

This course provides participants an overview and basic knowledge of environmental laws and

regulations pertinent to DOE projects. The course includes key DOE directives (especially DOE O 450.1A, DOE O 413.3B and DOE O 430.2B) and applicable Federal regulations and executive orders. The course introduces the wide range of environmental requirements with which the Department must comply as well as the appropriate resources to assist DOE staff and managers in the event they are asked to support or manage a project with potential environmental impacts. This course also serves to inform DOE employees of their roles in helping the Department to achieve its environmental sustainability goals, including reducing energy use, enhancing pollution prevention, and conserving water. This course is not meant to be an instruction manual for environmental topics at the department; rather, it aims to educate participants as to when to ask questions and to whom they should be directed.

**Target Participants:** Prospective Level 2 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 2 elective course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days **(CLIN-PMC-05)ANAGEMENT SYSTEMS (EVMS)**

# Earned Value Management Systems (EVMS)

This course is designed to address EVMS and project reporting requirements in order to effectively apply EVMS approaches in project management. Participants learn about Earned Value Management (EVM) processes, how they are interrelated, and how they must be integrated to produce an effective EVM System. The course is based on the requirements of DOE Order 413.3B and the guidance provided in DOE Guide 413.3-10, Earned Value Management Systems. The course is designed to give participants a framework for applying EVMS approaches to project management and knowledge of the process sufficient to oversee contractor EVMS processes. Some of the topics covered include: strategies to plan project work, monitor performance, utilize work breakdown structures (WBS), and collection and

interpretation of EV data.

**Target Participants:** Prospective Level 1 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days **(CLIN-PMC-06)**

**ADVANCED CONCEPTS IN PROJECT MANAGEMENT**

# Advanced Concepts in Project Management

The course focuses on nine major aspects of project management: Systems Engineering; Value

Management; Integrated Safety Management; Quality Planning Assurance and Control; Pre-Project Planning; Project Objectives and Logic; Project Scheduling Under Uncertainty; Critical Chain and Resource Buffers; Process Control; Project Scheduling Under Uncertainty; Critical Chain and Resource Buffers; and Process Control.

In addition to these topics, the course addresses specific individual, team, and organizational competencies and project leadership skills. This course is taught in an approach similar to a graduate school level course using both distance and on-site learning techniques. The course covers approximately two full weeks of classroom instruction distributed over a two month period. Much of the work will be self-paced during that time.

This course provides a “blended” learning environment over a five week period – a combination of the traditional lecture, on-site workshop, classroom discussions, independent and team research, presentations, and tele-video conferences. This course enables participants to apply their Level 1 project management knowledge in an extended research project and introduce a variety of selected topics pertaining to project management processes.

**Target Participants:** Prospective Level 2 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 2 core course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 5 weeks **(CLIN-PMC-07)**

**ADVANCED CONCEPTS IN FINANCIAL ASSISTANCE**

# Advanced Concepts in Financial Assistance

This course is designed to explore advanced topics relevant to financial assistance personnel. The course focuses on aspects of financial assistance management to include quality, NEPA, logistics and sourcing, and team development and management. In addition to these topics, the course addresses specific individual, team and organizational competencies and project leadership skills. It covers the concepts of project management with a special lens of financial assistance at an advanced level of expertise, and expands upon best practices from DOE, other Federal agencies, and the private sector.

**Target Participants:** Financial assistance professionals interested in Level 2 certification.

**Course Length:** 5 days **(CLIN-PMC-08)I**

# Scope Management Baseline Development

This course is designed to enhance the DOE Federal Project Directors’ ability to clearly define

requirements and scope, develop a defensible baseline, and manage conformance to the baseline throughout the project life-cycle.

The course covers a range of project management issues specific to the competency needs of a Level 2 Project Manager. The objective of this course is to prepare participants to conduct effective requirements planning sessions and to be able to control scope and configuration changes throughout the life cycle of the project. The course emphasizes the development of the Work Breakdown Structure (WBS). Topic areas include baseline development techniques, identifying risk and constraints for requirements, prioritizing requirements, trade-off analysis, iterative requirements management, and

scope change/configuration management.

**Target Participants:** Prospective Level 2 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 2 core course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days **(CLIN-PMC-09)U(CLIN-PMC-01)**

**LE ESTIMATION AND ANALYSIS**

# Cost and Schedule Estimation and Analysis

This course provides participants with a high-level overview of cost and schedule estimation techniques necessary for successful project management. Participants receive practical skills training on how to develop independent cost and schedule estimates and how such estimates factor into a project's baseline. The course teaches skills used across the project life cycle, but focuses on estimates developed in project planning and the early stages of project execution (preliminary design).

Course topics include: identifying cost and schedule estimates; basic estimating methods; group analysis techniques; applying life-cycle costing techniques, validating estimates, determining critical path schedule for a project; crashing and fast-tracking methods; and the relationship between budget authorization (BA) and budget outlay (BO) schedules, project estimates, and the project funding profile.

**Target Participants:** Prospective Level 2 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 2 core course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 5 days **(CLIN-PMC-10)I(CLIN-PMC-01)MULATION**

# Project Management Simulation

This computer-based project management simulation enables participants to exercise and integrate a wide variety of project management skills, including developing defensible project plans; applying PM tools and techniques to plan, track, and control projects; improving project team performance; analyzing project information; identifying complex project tradeoff decisions; and recognizing when to focus on task and when to focus on process.

**Target Participants:** Prospective Level 2 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 2 core course for certification in the Project Management Career Development Program (PMCDP)

**Course Length:** 5 days **(CLIN-PMC-11)**

# Value Management

Value Management provides participants with a means for re-examining projects with a view to

reducing total project costs. It focuses on the basics of what a product or service should offer while addressing a critical appraisal of the sales, cost, use, and esteem value of a product or service through analyzing the embedded functions. The course applies modern practices in the field of Value Engineering and Value Management which emphasize good communications and effective leadership of the people involved.

This course focuses on providing Value Engineering/Value Management essentials to DOE and Contractor personnel from Senior Managers to Project Directors and their extended teams. It includes a general introduction to VE/VM concepts, principles, definitions, success stories and the various legal and regulatory drivers that now mandate its application. It also focuses on building skills and understanding for applying VE/VM practices, tools and techniques to improve DOE project and program cost and schedule results, especially return on Investment (ROI). The course also teaches skills for organizing a VM effort, structuring a job plan, and analyzing the functions of systems, equipment, facilities and supplies to achieve the lowest life-cycle costs while maintaining the essential values of safety, performance, reliability, and quality.

**Target Participants:** Prospective Level 2 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 2 elective course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days **(CLIN-PMC-27)**

# Advanced Risk Management

The purpose of this course is to provide the Federal Project Director with an advanced understanding of the concepts and applications of risk and opportunity management, within the context of federally managed Department of Energy acquisition projects. This course improves Federal Project Directors’ ability to develop and execute project risk management plans and to oversee the risk management activities of their contractors. The course provides participants with more advanced treatment of risk management principles and concepts. It builds upon the concepts included in the basic *Risk Analysis and Management* course and reviews topics that are appropriate for Level 3 and 4 Federal Project Directors. It also introduces the notion of opportunity with respect to DOE acquisition project management. In addition to a review of topics covered in the basic course, participants discuss the impact of technology development and how new technology risk affects the typical project. The course also addresses representative project risk management software risk analysis tools, and uses two large

capital and operating dollar projects to enhance the learning through case study work.

**Target Participants:** Prospective Level 3 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 3 core course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3.5 days **(CLIN-PMC-12)**  **(CLIN(CLIN-PMC-01)-PMC-01) A((CLIN-PMC-01)CLIN-PMC-01)ND READINESS REVIEWS**

# Project Execution and Readiness Reviews

This course focuses on the skills necessary to successfully manage engineering and design, construction, acceptance and transition, and project closeout. Participants learn how to organize, manage, and review project designs and documentation, and to oversee contractor performance during construction. Participants also learn the skills needed to identify potential problems and how to plan to avoid them. Participants are given extensive practice in cost and schedule monitoring, including earned-value analysis, trend analysis and forecasting, managing baselines through performance monitoring and change control.

**Target Participants:** Prospective Level 3 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 3 elective course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days **(CLIN-PMC-13)ONSTRUCTION AND EXISTING BUILDINGS**

# LEED for New Construction and Existing Buildings

Leadership in Energy and Environmental Design (LEED®) for New Construction and Existing Buildings is designed to provide participants with the knowledge of the LEED® rating system and five LEED® categories and to make existing buildings and new construction environmentally sound. This course supports the Federal mandates for agencies to improve their buildings’ efficiency and environmental performance including green building certification.

**Target Participants:** Prospective Level 1 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 1 elective course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 2.5 days **(CLIN-PMC-14)**

**C(CLIN-PMC-01)**

# Capital Planning for DOE

In this course, participants review capital planning questions they should ask when a non-information technology capital asset project under the DOE O 413.3B is in each phase of the project’s acquisition. The course reviews the documents and reports from the budget formulation and acquisition planning processes that can be used to support the DOE’s budget submissions to the Office of Management and Budget (OMB). This course tracks the critical decision deliverables, reports, cyclical budget data, and narratives in the context of a structured capital planning process and the critical decision model for capital asset projects.

**Target Participants:** Prospective Level 1 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 1 elective course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 2 days **(CLIN-PMC-15)**

**REAL PROPERTY ASSET MANAGEMENT**

# Real Property Asset Management

During this course, participants focus on the requirements of DOE Order 430.1B, *Real Property Asset Management* (RPAM). Participants acquire a systematic, integrated approach to the management of federal real property, order requirements, reporting mechanisms, and roles and responsibilities for RPAM. The course addresses real property planning and management, Ten Year Site Plans, real property status reporting requirements and mechanisms, value management, performance management and DOE and contractor role and responsibilities for real property asset management. Also included in the course are the requirements contained in the February 2004 Executive Order 13327, *Federal Real Property Asset Management* and the January 2007 Executive Order 13423, *Strengthening Federal Environmental, Energy, and Transportation Management*.

**Target Participants:** Prospective Level 2 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 2 elective course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days **(CLIN-PMC-16)**

# Systems Engineering

This course focuses on how implementation of the Systems Engineering (SE) process, from project initiation through the entire life-cycle, can decrease the likelihood of cost overruns, schedule delays and compromises in program and project technical performance.

This course demonstrates how the SE process is an interdependent (and iterative) approach to technical management, acquisition and supply, system design, product realization, and technical evaluation. The course describes how the SE process cascades through each level of the system, beginning at the top (the system level) and propagating through a series of steps which eventually lead to a preferred system solution. This course describes in detail the purpose and value of each of the specific SE process steps.

Step-by-step directions, along with exercises, help course participants determine when each step is complete.

**Target Participants:** Prospective Level 3 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 3 elective course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days **(CLIN-PMC-17)NIN(CLIN-PMC-01)G**

# Strategic Planning

Strategic Planning provides participants with an introduction to the skills needed to develop effective strategic plans for organizations, programs and projects, and techniques they can employ to make better strategic decisions. Participants review theories and techniques for improving productivity, as well as techniques for formulating and implementing a planning process. Participants are shown how to make decisions based on strategic plans that give specific direction yet remain flexible enough to respond to changing conditions.

**Target Participants:** Prospective Level 3 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 3 elective course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days **(CLIN-PMC-18)**

**PROGRAM MANAGEMENT AND PORTFOLIO ANALYSIS**

# Program Management and Portfolio Analysis

Focusing on collaboration, defending resources, and creative compromise, this automated simulation and case study addresses developing a strategic view of projects. Participants learn about managing priorities among projects, coordinating the information needs of multiple projects, allocating and managing resources, preparing project staff to meet future needs, balancing responsibilities for project and functional management, and applying project management methods in a complex project setting. The objective of this computer-based program management simulation is to enable participants to gain hands-on experience planning, implementing, and coordinating multiple, complex projects across an organization.

**Target Participants:** Prospective Level 3 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 3 core course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 5 days  **(CLIN-PMC-19) ((CLIN-PMC-01)CLIN-PMC-01) (CLIN-PMC-01) (CLIN-PMC-01) (CLIN-PMC-01)** **(N-PMC**

# Understanding Project Management and Preparing For the PMP EXAM

The purpose of this course is to prepare participants to pass the Project Management Institute’s (PMI) Project Management Professional® (PMP®) certification examination. As part of the training, participants take two practice exams and receive feedback on their performance. Course materials include a PMP® exam preparation resource book. Instruction includes application of the concepts in a case study.

**Target Participants:** Ideal candidates are those project and program management professionals who are authorized to take the PMP® examination within four to twelve months from completion of this course.

**Course Length:** 5 days  **(CLIN-PMC-20)OF PROGRAM MANAGEMENT**

# Fundamental of Program Management

Fundamentals of Program Management is a high-level overview of DOE program management, and a vehicle for allowing the program manager to self-assess which topical areas to more fully pursue. This course is primarily designed for those wishing to learn more about the roles and responsibilities of the Department of Energy (DOE) Program Manager, and current or aspiring program managers wishing to further enhance their understanding of the DOE program management. Participants learn to apply a strategic management system to their program, conduct program planning, develop program management plans, manage the development and defense of their budget, implement their program management plans, work with projects and DOE certified Federal Project Directors to further their program, and evaluate program effectiveness. Other topics covered by this course are promoting of collaborative planning management, motivating teams, developing action plans, identifying key players and making informed decisions using business analysis tools.

**Target Participants:** This course is suggested as part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers are encouraged to attend this course as a refresher. Also appropriate for professionals interested in gaining an understanding of program management.

**Course Length:** 5 days **(CLIN-PMC-21)**

# Breaking the Code: Understanding Project Management

The purpose of this course is to introduce participants to the basics of DOE’s Project Management system and processes in order to improve their performance as members of the project management team. By the end of this course, all participants should: be familiar with the essential principles and concepts of the discipline of project management as it applies to the work and culture of the Department of Energy, including the National Nuclear Security Agency (NNSA); be able to identify the DOE’s project management system and processes throughout the project lifecycle; and more completely understand their performance requirements in the functional areas in which they respond and interact with DOE’s Project Directors, project staff, and project contractors.

**Target Participants:** Professionals interested in gaining an understanding of project management in the DOE context.

**Course Length:** 3 days **(CLIN-PMC-22)**

**ANNING AND MANAGING PROJECT TEST AND EVALUATION**

# Planning and Managing Project Test and Evaluation

This entry-level course provides a general overview and is designed to help participants understand the systems approach to Test and Evaluation (T&E). Through assessment of whether there is a difference between what was expected and what occurred, and the evaluation of the results, participants gain the knowledge they need for effective test measurement. Participants learn to define the types of testing, understand the importance of safety and security testing, and know what is required to develop and effectively manage a T&E plan. This two-day, classroom based course uses a series of case studies to reinforce the T&E basic process and steps which are applicable to all projects. Lessons include: Fundamental Basis of a T&E Program, Component (Unit) Testing, Integration Testing, Performance Testing, Customer Acceptance and Operability Testing, Safety & Security Testing, Systematic T&E Planning, and Managing the T&E Program.

**Target Participants:** Professionals interested in learning more about systems approach to test and evaluation.

**Course Length:** 2 days**R (CLIN-PMC-23)**

**VIEW OF DOE ORDER 413.3B**

# Executive Overview of DOE Order 413.3B

This high level briefing is designed for U.S. Department of Energy (DOE) contractor executives,

managers and others who need a basic understanding of the structure and requirements associated with DOE’s project management system as codified in DOE Order 413.3B, *Program and Project Management for the Acquisition of Capital Assets*. This course covers discussion of the underlying philosophy and structure of DOE Order 413.3B, DOE roles and responsibilities, the five Critical Decisions and the major deliverables associated with each, the required project reviews and their key players, special requirements for nuclear facilities, requirements contained in the DOE Order 413.3B Contractor Requirements Document and the discussion of the implications of DOE O 413.3B for project cost and schedule estimating.

**Target Participants:** This course will be of interest to any executive professional interested in learning more about DOE O 413.3B. This training is not intended for Field Project Directors, team leaders, planners, estimators or project controls personnel who require a more detailed understanding of DOE Order 413.3B.

**Course Length:** 2 hours **(CLIN-PMC-24)**

**LIFE CYCLE COST ESTIMATING**

# Life Cycle Cost Estimating

This course provides participants with instruction in life cycle cost estimation requirements and policies. Participants apply various techniques and formulae to construct a life cycle cost estimate analysis, and learn how to use life cycle cost estimating in program and project decision-making. This course addresses the topic of life cycle cost estimating from this decision analysis perspective, rather than from an estimate development perspective. Topics include: a brief history of life cycle cost estimating, current laws, directives and policies; a refresher on the principles of time value of money; analyzing cost estimates to ensure proper incorporation of life cycle estimating principles and decision making; and a review of representative DOE estimates to apply these skills.

**Target Participants:** DOE personnel whose responsibilities include the development, oversight, or review of program and project cost estimates.

**Course Length:** 2 days **(CLIN-PMC-25)**

**FACILITIES INFORMATION MANAGEMENT SYSTEM (FIMS)**

# Facilities Information Management Systems (FIMS) Validation

The course teaches DOE and contractor facilities management staff the standard and process required for validation of key FIMS information. Participants learn the applied knowledge of the statistical principles, validation standard, and the step by step process required to perform a validation on the FIMS replacement plant value (RPV), the asset condition index (ACI), and the asset utilization index (AUI) as well as the other metrics and data elements that will be presented.

**Target Participants:** Employee interested in learning more about the FIMS validation process.

**Course Length:** 3 days **(CLIN-PMC-26)**

**Acquisition Management Topics**

**ACQUISITION MANAGEMENT FOR TECHNICAL PERSONNEL**

# Acquisition Management for Technical Personnel

Every year the Department of Energy spends over 90 percent of its budget on purchases from the private sector. Because of the Federal Government's special fiduciary relationship, the acquisition system established to manage these expenditures of taxpayer monies is very different in some respects from commercial transactions between private parties. The principal purpose of the DOE acquisition system is to deliver on a timely basis the best value product or service to the customer while adhering to the laws, regulations, policies, and directives of the United States Government and the Department. This course examines the portion of the acquisition process commonly referred to as “procurement.” This part of the process typically begins with the completion of the acquisition strategy and the development of the acquisition plan. The process proceeds through development of a solicitation, solicitation and evaluation of proposals, and contract award. Another DOE course, Contract Administration for Technical Representatives, continues through contract administration and contract closeout (although

these topics are summarized at the end of this course to provide a complete picture of the acquisition process).

**Target Participants:** Prospective Level 1 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 5 days **(CLIN-AMC-01)**

**CONTRACT ADMINISTRATION FOR TECHNICAL RESTATIVES**

# Contract Administration for Technical Representatives

This course is specifically designed for Contracting Officers Representatives (CORs). The purpose of this course is to help those employees with valuable technical or functional expertise but little formal acquisition training or experience know what to do and what not to do as CORs. This course provides fundamental knowledge and hands-on exercises to help participants understand the importance of the COR function as it relates to each stage of the contract administration process. Topics include: the Federal acquisition process as it pertains to the COR function; DOE’s approach to contract administration; the role of the COR, particularly in relation to the contracting officer and the contractor; the duties of the COR and how to effectively complete assigned responsibilities; and the ethical standards of conduct to which CORs must adhere.

**Target Participants:** Prospective Level 1 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days**IAL (CLIN-AMC-02)ASSISTANCE FUNDS MANAGEMENT**

# Federal Financial Assistance Funds Management

This course focuses on determining whether prospective award recipients have an adequate financial management system to manage Federal funds and whether they are financially capable to perform the work. To make this determination, participants identify the components of an adequate financial management system and assess a recipient’s management system and financial capability based on interactive exercises. Additionally, participants are instructed on Office of Management and Budget Circular A-133 (Circular A-133) audit requirements and determine when an audit is necessary, the roles and responsibilities of participants in the audit process, and reporting and submission requirements. Upon completion of the course, DOE participants are able to: determine whether prospective award recipients have an adequate financial management system; determine whether a firm is financially capable to perform the work; determine audit requirements in accordance with Circular A-133.

**Target Participants:** Professionals interested in better evaluating the fitness of financial assistance award recipients.

**Course Length:** 2 days **(CLIN-AMC-03) OF FEDERAL FINANCIAL ASSISTANCE**

# Fundamentals of Federal Financial Assistance

This course gives the participant a foundation in the processes and applications of Federal financial assistance. Participants learn the different ways that Federal dollars are dispensed within DOE (acquisitions versus financial assistance), and that the choice is one that requires exercise of discretion and judgment; the legal framework of assistance and the interrelationships of the relevant laws and regulations; the requirements for preparing a Funding Opportunity Announcement; the process for negotiating and awarding a Federal financial assistance instrument and; the basic topics involved with award administration (recipient cash management requirements, prior approvals, retention of and access to records, audit procedures, handling suspensions, and termination).

**Target Participants**: Professionals interested in learning more about financial assistance.

**Course Length:** 5 days**A C(CLIN-AMC-04)T**

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# Types of Contracts

This course introduces participants to the various types of contracts employed by DOE. It discusses the aspects of consideration of cost risks in selection decisions, and describes the methods of utilizing fixed price economic price adjustment contracts. Participants gain knowledge of structuring and applying incentives pricing and award fee pricing arrangements.

Course objectives include: understanding the basic principles and limitations for the use of fixed price and cost reimbursement contracts; cost and performance risk in contract type selection; selecting a contract type; applying Economic Price Adjustments and; knowing how to apply incentive and award fee compensation.

**Target Participants:** Program and project personnel interested in contracting or as a refresher for previously trained procurement personnel.

**Course Length:** 2 days **(CLIN-AMC-05) PURCHASE CARD PROGRAM**

# Introduction to Purchase Card Program

This course is specifically designed for new cardholders. It requires no prior background in acquisition or other training prerequisites. Its purpose is to prepare first-time users of the Government Purchase Card (P-Card) in what to do and what not to do as cardholders.

This course provides the necessary P-Card process, ethics, and responsibility training. Participants of this course receive instruction in the basic concepts of Government contracting and accountability, and its implementation via the GSA “SmartPay” program. Program points of contact, objectives, specific roles/responsibilities, and basic processes will be explained during the instruction. Participants learn how to properly employ this method for individual purchases to provide timely, cost effective support, while maintaining appropriate attention to fiduciary duties. Practical application of P-Card methodology will be enhanced through course exercises and discussions.

**Target Participants:** New purchase card cardholders.

**Course Length:** 2 days **P (CLIN-AMC-06)URCHASE CARD PROGRAM REFRESHER**

# Introduction to Purchase Card Program Refresher

This course is designed as a refresher for employees who have already completed the 2-day training on purchase card delegation/appointment. Topics include: instruction in the basic concepts of Government contracting and accountability and its implementation via the GSA "SmartPay" program; the purchase card process; an overview of the DOE acquisition environment, procurement methods, and acquisition reform efforts suitable to provide a context for purchase card use; the statutory, regulatory, and policy requirements related to procurement integrity/ethics, and their application in a purchase card environment.

**Target Participants:** Employees that have completed the 2-day purchase card training course and are seeking a refresher.

**Course Length:** 1 day **E(CLIN-AMC-07)F**

COR Refresher

This course is designed to review the COR’s of responsibilities and the contracting environment in which they operate. The course also provides the opportunity for CORs to discuss with each other the situations and experiences they have encountered in their performance of COR duties. Finally, the course provides an update on developments in the DOE acquisition and contract management process and presents information on new trends, issues, and concerns in Government procurement. Course objectives include: recalling the operation of the Federal acquisition process as it pertains to the COR function; DOE’s approach to contract administration; the role of the COR; understanding of the ethical standards of conduct to which CORs must adhere; the major trends, developments and issues in DOE and Federal Acquisition and contract management.

**Target Participants:** This course is specifically designed for Contracting Officer’s Representatives (CORs) who are required to participate in COR Refresher training every two years.

**Course Length:** 1 day **(CLIN-AMC-08)F**

**RESHER**

# Contract Administration for M&O Contractors

This course is designed to review the COR’s of responsibilities and the contracting environment in which they operate. The course also provides the opportunity for CORs to discuss with each other the situations and experiences they have encountered in their performance of COR duties. Finally, the course provides an update on developments in the DOE acquisition and contract management process and presents information on new trends, issues, and concerns in Government procurement. Course objectives include: recalling the operation of the Federal acquisition process as it pertains to the COR function; DOE’s approach to contract administration; the role of the COR; understanding of the ethical standards of conduct to which CORs must adhere; the major trends, developments and issues in DOE and Federal Acquisition and contract management.

**Target Participants:** This course is specifically designed for Contracting Officer’s Representatives (CORs) who are required to participate in COR Refresher training every two years.

**Course Length:** 1 day **(CLIN-AMC-13)** **TRACT CHANGES**

# Managing Contract Changes

This course is designed to better prepare DOE Contracting Officers (COs) and Federal Project Directors (FPDs) to manage project changes on complex construction projects through effective management of contract modifications and change orders. DOE guidance, reference materials and actual cases from the Boards of Contract Appeals and the U.S. Court of Federal Claims are discussed to improve participant understanding of principles, concepts and doctrines that impact contract change management in DOE. The course discusses DOE’s historical and current contracting environment, the doctrine of constructive change, potential differences between project management changes and contract changes, and the things DOE senior level contracting and program officials can do to improve the effectiveness of the change management process.

**Target Participants:** Prospective Level 1 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 4 days**A (CLIN-AMC-09)SED MANAGEMENT CONTRACTING**

# Performed-Based Management Contracting

This course is designed so that program and project managers, as well as contracting personnel, better understand the need to continue and accelerate this move toward performance-based major site and facility contracts. The course also addresses the processes by which these performance-based site and facility management contracts are planned, awarded, and managed after award. The overall objective is to focus on major site and facility contracts and to present the performance-based concepts and tools required in each aspect of the planning, award, and post award processes for these contracts. While many of the topics covered in this course are also addressed in other DOE courses, most notably “Acquisition for Technical Personnel,” and “Contract Administration for Technical personnel,” this course focuses exclusively on major site and facility contracts and the unique challenges involved in making them performance-based.

**Target Participants:** Prospective Level 1 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). This is a Level 1 elective course for certification in the Project Management Career Development Program (PMCDP).

**Course Length:** 3 days**S (CLIN-AMC-10)OF FEDERAL FINANCIAL ASSISTANCE**

# Cost Principles of Federal Financial Assistance

This course is designed to provide any DOE personnel, including those at entry level, who work with Federal financial assistance instruments the information to understand cost principles. Participants learn information on the cost principles of OMB Circulars A-21, A-87, and A-122 as well as FAR 31.2 in order to determine the appropriate amount of cost review necessary to successfully award federal assistance instruments. Upon completion of the course, DOE participants are able to: distinguish differences among OMB Circulars A-21, A-87, and A 122, as well as FAR 31.2 to judge acceptability of costs; determine whether costs are allowable or unallowable; assess DOE gray area costs to determine their acceptability; demonstrate knowledge of direct and indirect costs by developing an indirect cost rate.

**Target Participants:** Professionals interested in gaining an understanding of Federal financial assistance instruments.

**Course Length:** 2 days **(CLIN-AMC-11)**

# Performance-Based Acquisition: Preparing Statements of Work

This course demonstrates how to lay a solid foundation for any service contract by establishing a sound performance-based approach from the start. Participants learn the critical steps to take in procurement planning and request for proposals preparation to implement the performance-based approach. Emphasizing preparation of a performance-based work statement, the course focuses on the use of draft solicitations; team development of the work breakdown structure and task identifications; conversion of cost-plus requirements to fixed-price; use of incentives, deductions and penalties in connection with performance goals; and application of specific cost and performance measurement techniques, quality assurance surveillance plans, and quality-related evaluation factors.

**Target Participants:** Professionals interested in writing effective statements of work.

**Course Length:** 3 days **(CLIN-AMC-12)**

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ON 100: SHAPING WIN-WIN ACQUISITIONS**

**SFederal Budgeting and Accounting Topics**

**FEDERAL BUDGETING PROCESS IN DOE**

# Federal Budgeting Process in DOE

This course is designed to provide program and project managers a working knowledge of DOE’s

financial and managerial systems to accomplish the Department’s budgeting and accounting processes, including budget submissions, managing authorized funding and establishing success criteria. It emphasizes program and project managers’ effective use of these financial systems and processes to accomplish DOE’s mission. Participants apply the foundational skills required to successfully manage a DOE project through its financial life cycle. These skills include: integrating projects, programs, and DOE missions; resourcing and funding programs; validating and funding projects; effectively participating in the DOE budget process; managing the flow of funds to your programs and projects and; effectively using DOE’s financial accounting and reporting systems to attain program and project success.

**Target Participants:** Prospective Level 2 Federal Project Directors, DOE Program Managers, and IPT members assigned to projects (including matrixed personnel). Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

**Course Length:** 2 or 4 days **(CLIN-FBAC-01)**

*\*The 4 day version of this course covers a Level 2 elective course for PMCDP certification. This course 2 day version is for the audiences who do not need to cover the DOE accounting systems. The 2 day version does not provide PMCDP credit.*

**OVERVIEW OF DOE FINANCIAL MANAGEMENT**

# Overview of DOE Financial Management

This course gives participants a high level overview of all aspects of financial management that are unique to DOE. Beginning with DOE’s history, current structure, mission, and strategic focus, the course illustrates the framework of financial management within the Department. Roles and responsibilities of the CFO community, and roles and responsibilities at HQ and in the field are discussed. Budget formulation and execution, accounting, business systems and financial reporting requirements are discussed. The course also covers DOE management accountability and controls and the future of financial management at DOE.

**Target Participants:** Professionals interested in financial management.

**Course Length:** 5 days **(CLIN-FBAC-02)**

**FEDERAL APPROPR**

# Federal Appropriations Law Mastery

This course is a 32-hour intensive exposure to the principles and practices of appropriations law in the federal workplace. This course is designed for personnel whose responsibilities include the certification, accounting, and disbursement of federal funds, as well as for program manager and budget officials who must regularly make financial decisions. The course covers the essential elements of appropriations law, beginning with the Constitution and covering key elements of the US Code, court decisions, and decisions of the Comptroller General.

**Target Participants:** Program managers responsible for Federal budgeting procedures.

**Course Length:** 4 days**N (CLIN-FBAC-03)TING STANDARDS**

# Federal Accounting Standards

This course is designed to acquaint the participant with key standards of federal accounting. It covers the approved concepts and standards comprising Generally Accepted Accounting Principles for the US federal government, and systematically provides the participants with an understanding of how federal transactions are properly recorded in the accounting records.

**Target Participants:** Accounting professionals, as well as generalist personnel who desire an in-depth exposure to federal accounting principles.

**Course Length:** 4 days **(CLIN-FBAC-04)DERAL ACCOUNTING PRINCIPLES**

# Overview of Federal Accounting Principles

This course is an overview of key elements of federal accounting and offers professionals who are nonaccountants an interesting review of the methodology and practice of federal accounting. The course is useful to all professionals seeking a better understanding of how the United States maintains its financial records and reports financial results.

**Target Participants:** Professionals interested in understanding the fundamentals of Federal accounting.

**Course Length:** 1 day **(CLIN-FBAC-05)**

**FOR SENIOR FEDERAL OFFICIALS**

# Elements of Finance for Senior Federal Officials

This course is for senior professionals, whether financial or otherwise, and provides an overview of federal finance from a senior-level perspective. It covers the four phases of the federal financial process, including budget formulation, congressional action, budget execution, and reporting, performance measurement and audit. It is designed to acquaint the senior official with the limits of his or her authority and the risks of exceeding assigned authority.

**Target Participants:** Senior leaders and executives in need of an overview of Federal financing.

**Course Length:** 2 days **(CLIN-FBAC-06)**

**SUFUL BUDGET JUSTIFICATION AND PRESENTATION**

# Successful Budget Justification and Presentation

This course enhances the capabilities of federal personnel in preparing, justifying, and presenting budget requests to the OMB and Congress. It focuses on the preparation of materials, technical and financial analysis, presentation techniques, working with congressional committees and staffs, and OMB interface. It will be useful to any professional whose responsibilities include preparing for or conducting liaison with the Congress in the budget cycle.

**Target Participants:** Professionals involved in the Department’s budgeting process.

**Course Length: 2** days **P R(CLIN-FBAC-07)ICING**

# Fair and Reasonable Pricing

This course focuses on fair and reasonable pricing as defined in Title 48, CFR, and on the methodologies to attain them. It explores the responsibilities of contracting officers and support officials in making determinations of fairness and reasonableness of pricing data. This course is valuable to all professionals in the business of procuring goods and services for the United States.

**Target Participants:** Professionals involved in procuring goods and services.

**Course Length:** 1 day **(CLIN-FBAC-08)**

# Reimbursable Agreements

This course addresses interagency transactions at the federal level. It covers principles of law that apply to all federal agencies, unless a specific agency had alternative statutory authority. Agency-specific issues are incorporated into classroom discussion.

**Target Participants:** Professionals involved in inter-agency transactions.

**Course Length: 2** days **T (CLIN-FBAC-09)HE FAR**

# Introduction to the FAR

In this course, participants develop a broad understanding of the Federal Acquisition Regulation and its primary components. Through classroom discussion, lecture, and exercises, participants gain an understanding of the purpose, structure, and usage of the regulation, as well as an understanding of the government contracting process. Topics such as the structure and content of the FAR, definitions and usage of contracting terminology, improper business practices and personal conflicts of interest, and contracting methods and types are discussed.

**Target Participants:** Professionals interested in an overview of the FAR.

**Course Length:** 1 or 2 days **(CLIN-FBAC-10)**

*\*Course length may be tailored.*

**GOVERNMENT CONTRACT LAW**

# Government Contract Law

In this course, participants develop a broad understanding of the structure, extent and limitations of government contract law, and the related authorities and responsibilities of contracting officers and their representatives. The course enables participants who do not have the benefit of a legal education to understand and apply the appropriate legal concepts in their work endeavors. Key concepts in this course include: laws and regulations that form and underpin government contracting action; types of acquisitions and solicitation techniques; legal requirements and procedures in sealed bidding and contracting by negotiation; the types of contracts, subcontracting, and contract administration performance; legal remedies for bidders, contractors and government; and, the roles of the GAO and the US Court of Federal Claims.

**Target Participants:** Professionals interested in an introduction of Government contract law.

**Course Length:** 5 days **E(CLIN-FBAC-11)S ALIVE™: FINANCIAL LITERACY AND BESS**

**ACUMEN**

# Accounting Comes Alive: Financial Literacy and Business Acumen

Accounting Comes AliveTM is a breakthrough learning method that sharpens accounting and financial literacy to enable participants to better understand financial reports. This proprietary system is used at the world’s top banks, investment houses, government agencies, businesses, and universities (including Harvard Business School). This course treats accounting as a language instead of a technical, expert topic.

**Target Participants:** Employees working with budgets or needing to understand financial reports. Appropriate for staff with limited accounting knowledge as well as more experienced managers needing a refresher.

**Course Length:** 1-2 days **(CLIN-FBAC-12)**

*\*Course length may be tailored.*

**EN**

**Microsoft Office 2010**

**Microsoft Office Outlook: Level 1**

**You will use Outlook to compose and send email, schedule appointments and meetings, manage contact information, schedule tasks, and create notes. To be successful in this course, you should be familiar with using personal computers. You should be comfortable in the Windows environment and be able to use Windows to manage information. Specifically, you should be able to launch and close programs; navigate to information stored on a computer; and manage files and folders.**

**Upon successful completion of this course, students will be able to:**

* Explore the Outlook interface, send mail, and respond to messages.
* Compose email messages.
* Organize email messages into folders.
* Manage contacts and contact information.
* Schedule appointments.
* Schedule a meeting.
* Manage tasks and notes.

**Target Participants:** This course is intended for people who have a basic understanding of Microsoft Windows and want to know how to use Outlook to manage their time and information.

**Course Length:** 1 day **(CLIN-MSC-01)**

**Microsoft Office Outlook: Level 2**

You will customize the Outlook environment, calendar, and mail messages, and will also track, share, assign, and quickly locate various Outlook items. Prospective students should be familiar with using personal computers (basic typing skills are recommended). They should be comfortable with the Windows environment and be able to use Windows to manage information on the computer. Specifically, they should be able to launch and close programs; navigate to information stored on the computer; and manage files and folders.

**Upon successful completion of this course, students will be able to:**

* Customize message settings.
* Organize and locate Outlook messages.
* Set calendar options.
* Track activities using the Journal.
* Assign and track tasks.
* Share folder information.
* Customize the Outlook environment.

**Target Participants:** This course is designed for experienced Outlook users who need to customize their Outlook environment, calendar, and email messages and who wish to track, share, assign, and locate various Outlook items.

**Course Length:** 1 day **(CLIN-MSC-02)**

**Microsoft Office Outlook: Level 3**

You will work with the advanced features of Outlook. This course assumes that you are proficient with Windows to manage information on your computer and that you have an intermediate knowledge of Outlook.

**Upon successful completion of this course, students will be able to:**

* Personalize their email.
* Organize Outlook items.
* Manage Outlook data files.
* Work with contacts.
* Save and archive email messages.
* Create a custom form.
* Work offline and remotely.

**Target Participants:** This course is intended for persons with an intermediate understanding of Outlook who need to use Outlook to personalize and organize their email, manage Outlook data files, share and link contacts, archive items, create forms, and work offline and remotely.

**Course Length:** 1 day **(CLIN-MSC-03)**

**Microsoft Office Project: Level 1**

You will create and manage a project schedule using Microsoft® Project 2010. Students enrolling in this class should have a general introductory-level understanding of project management concepts and basic end-user skills with any current Windows operating system.

**Upon successful completion of this course, students will be able to:**

* Identify the basic features and components of the Microsoft Project environment.
* Create a new project plan file and enter project information.
* Manage tasks by organizing tasks and setting task relationships.
* Manage resources for a project.
* Finalize a project plan.

**Target Participants:** This course is designed for a person who has an understanding of project management concepts, who is responsible for creating and modifying project plans, and who needs a tool to manage those project plans.

**Course Length:** 1 day **(CLIN-MSC-04)**

**Microsoft Office Project: Level 2**

You will manage and customize project plans during the implementation stage of a project. Students enrolling in this class should have the ability to create and update project plans using Microsoft Project 2010.

**Upon successful completion of this course, students will be able to:**

* Exchange project plan data with other applications.
* Update a project plan.
* Manage project costs.
* Report project data visually.
* Reuse project plan information.

**Target Participants:** This course is designed for a person who has an understanding of project management concepts, who has the basic skills to create and modify project plans using Microsoft Project 2010, and who needs to use Microsoft Project 2010 to manage and customize those plans through the implementation stage of a project.

**Course Length:** 1 day **(CLIN-MSC-05)**

**Microsoft Visio: Level 1**

You will design and manage basic diagrams, workflow, and flowcharts. Students should be familiar with using personal computers and have used a mouse and keyboard (basic typing skills are recommended). They should be comfortable in the Windows environment and be able to use Windows to manage information on their computers. Specifically, they should be able to launch and close programs; navigate to information stored on the computer; and mange files and folders.

**Upon successful completion of this course, students will be able to:**

* Become familiar with the Visio interface and create a basic Visio document.
* Create a route map by using Visio features to work with shapes and text.
* Modify, format, and arrange shapes to enhance a basic diagram.
* Create process diagrams.
* Represent an organization hierarchy as a Visio diagram.

**Target Participants:** This course is designed for persons who have an understanding of the basic workflow and the concept of end-to-end flowcharting.

**Course Length:** 1 day **(CLIN-MSC-06)**

**Microsoft Visio: Level 2**

You will create custom elements and a custom template, represent external data as a drawing, and share your work with others.

**Upon successful completion of this course, students will be able to:**

* Create a custom shape.
* Design a custom stencil.
* Design styles and templates.
* Design a floor plan.
* Represent external data in Visio.
* Share your work.

**Target Participants:** This course is designed for a person who has an understanding of the basic workflow and the concept of end-to-end flowcharting.

**Course Length:** 1 day **(CLIN-MSC-07)**

**Microsoft Office Word: Level 1**

You will create, edit, and enhance standard business documents using Microsoft® Office Word 2010. To be successful in this course, you should be familiar with using personal computers and you should have used the mouse and keyboard. You should be comfortable in the Windows environment and be able to use Windows to manage information on the computer. Specifically, you should be able to launch and close programs; navigate to information stored on the computer; and manage files and folders.

**Upon successful completion of this course, students will be able to:**

* Identify and work with basic Word 2010 tools and features.
* Edit text in a Word document.
* Modify the appearance of text in a Word document.
* Insert special characters and graphical objects.
* Organize data in tables.
* Proof a Word document.
* Control the appearance of pages in a Word document.
* Print a Word document

**Target Participants:** This course is designed for students who wish to learn the basic operations of the Microsoft Word to perform their day-to-day responsibilities, and who want to use the application to be more productive in their work. It provides the fundamental knowledge and techniques needed to advance to using more complex Word features such as protecting your documents and usage of ligatures.

**Course Length:** 1 day **(CLIN-MSC-08)**

**Microsoft Office Word: Level 2**

You will create complex documents and build personalized efficiency tools using Microsoft Office Word 2010. Students should be able to use Microsoft Word 2010 to create, edit, format, save, and print basic business documents containing text, tables, and graphics.

**Upon successful completion of this course, students will be able to:**

* Manage lists.
* Customize tables and charts.
* Customize the formatting of a document using styles and themes.
* Modify pictures in a document.
* Create customized graphic elements.
* Insert content using Quick Parts.
* Control text flow.
* Use templates to automate document creation.
* Use the mail merge function.
* Use macros to automate common tasks.

**Target Participants:** This course is designed for persons who are able to create and modify standard business documents in Microsoft Word 2010, but need to know how to create or modify complex business documents and customized Word efficiency tools.

**Course Length:** 1 day **(CLIN-MSC-09)**

**Microsoft Office Word: Level 3**

You will create, manage, revise, and distribute documents. Students should be able to use Microsoft Office Word 2010 to create, edit, format, save, and print business documents that contain text, tables, and graphics. Students should also be able to use a web browser and an email program. In order to understand how Word interacts with other applications in the Microsoft Office System, students should have a basic understanding of how worksheets and presentations work.

**Upon successful completion of this course, students will be able to:**

* Use Word with other programs.
* Collaborate on documents.
* Manage document versions.
* Add reference marks and notes.
* Simplify the use of long documents.
* Secure a document.
* Create forms.

**Target Participants:** This course is designed for persons who want to gain skills necessary to manage lengthy documents, collaborate with others, and secure documents.

**Course Length:** 1 day **(CLIN-MSC-10)**

**Microsoft Office Excel: Level 1**

You will create and edit basic Microsoft Office Excel 2010 worksheets and workbooks. To be successful in this course, you should be familiar with using personal computers and you should have used the mouse and keyboard. You should be comfortable in the Windows environment and be able to use Windows to manage information on the computer. Specifically, you should be able to launch and close programs; navigate to information stored on the computer; and manage files and folders.

**Upon successful completion of this course, students will be able to:**

* Create a basic worksheet by using Microsoft Office Excel 2010.
* Perform calculations in an Excel worksheet.
* Modify an Excel worksheet.
* Format a worksheet.
* Print the content of an Excel workbook.
* Manage an Excel workbook.

**Target Participants:** This course is designed for students who desire to gain the necessary skills to create, edit, format, and print basic Microsoft Office Excel 2010 worksheets.

**Course Length:** 1 day **(CLIN-MSC-11)**

**Microsoft Office Excel: Level 2**

You will use advanced formulas and work with various tools to analyze data in spreadsheets. You will also organize table data, present data as charts, and enhance the look and appeal of workbooks by adding graphical objects.

**Upon successful completion of this course, students will be able to:**

* Use advanced formulas.
* Organize worksheet and table data using various techniques.
* Create and modify charts.
* Analyze data using PivotTables, Slicers, and PivotCharts.
* Insert and modify graphic objects in a worksheet.
* Customize and enhance workbooks and the Microsoft Office Excel environment

**Target Participants:** This course is meant for those desiring to gain advanced skill sets necessary for calculating data using functions and formulas, sorting and filtering data, using PivotTables and PivotCharts for analyzing data, and customizing workbooks.

**Course Length:** 1 day **(CLIN-MSC-12)**

**Microsoft Office Excel: Level 3**

You will automate some common Excel tasks, apply advanced analysis techniques to more complex data sets, troubleshoot errors, collaborate on worksheets, and share Excel data with other applications.

**Upon successful completion of this course, students will be able to:**

* Enhance productivity and efficiency by streamlining the workflow.
* Collaborate with other workbook users.
* Audit worksheets.
* Analyze data.
* Work with multiple workbooks.
* Import and export data.
* Integrate Excel data with the web.
* Structure workbooks with XML.

**Target Participants:** This course was designed for students desiring to gain the skills necessary to create macros, collaborate with others, audit and analyze worksheet data, incorporate multiple data sources, and import and export data.

**Course Length:** 1 day **(CLIN-MSC-13)**

# Microsoft Office Excel: Level 4

You will use the advanced features of Microsoft® Office Excel® 2010 to attain proficiency as an Excel power user. Excel 2010 knowledge, including how to create, edit, format, and print worksheets that include charts and sorted and filtered data is required. You should also know how to write and edit simple formulas.

**Upon successful completion of this course, students will be able to:**

* Manipulate data using statistical and lookup functions.
* Analyze data using the data analysis tools in Microsoft Excel 2010.
* Make investment decisions using the financial functions in Excel 2010.
* Examine data using math functions in Excel 2010.
* Manipulate data using text and information functions in Excel.
* Create templates and work with Excel's advanced chart options.
* Manage data in Excel workbooks.

**Target Participants:** This course is designed for advanced Microsoft Office Excel professionals who may work or be interested in the domain of finance, statistics, project analysis, and market analysis including the fields of micro- and macro-economics.

**Course Length:** 1 day **(CLIN-MSC-14)**

# Microsoft Office Access 2010: Level 1

You will create and modify new databases and their various objects.

**Upon successful completion of this course, students will be able to:**

Identify the basic components of an Access database.

Build the structure of a database.

Manage data in tables.

Query a database.

Design forms.

Generate reports.

**Target Participants:**

This course is intended for people who have a basic understanding of Microsoft Windows.

**Prerequisites:**

To ensure your success, we recommend you first take Windows courses, such as either of the following, or have equivalent skills and knowledge:

Windows XP Professional: Level 1 or

Windows XP: Introduction

**Course Length:** 1 day **(CLIN-MSC-15)**

# Microsoft Office Access 2010: Level 2

You will improve and customize tables, queries, forms and reports, and share Access data with other applications.

**Upon successful completion of this course, students will be able to:**

Streamline data entry and maintain data integrity.

Join tables to retrieve data from unrelated tables.

Create flexible queries to display specified records, allow for user-determined query

criteria, and modify data using queries.

Improve forms.

Customize reports to organize the displayed information and produce specific print

layouts.

Share data between Access and other applications

**Target Participants:**

This course is intended for people who have a basic understanding of Microsoft Windows.

**Prerequisites:**

Microsoft Office Access 2010: Level 1, or have equivalent knowledge and skills.

**Course Length:** 1 day **(CLIN-MSC-16)**

# Microsoft Office Access 2010: Level 3

You will create complex Access databases by structuring existing data, writing advanced queries, working with macros, and performing database maintenance.

**Upon successful completion of this course, students will be able to:**

Restructure data into appropriate tables to ensure data dependency

and minimize redundancy.

Write advanced queries to analyze and summarize data.

Create and revise Microsoft Office Access 2010 macros.

Customize reports by using various Microsoft Office Access 2010

features.

Maintain their databases using Microsoft Office Access 2010 tools.

**Target Participants:**

This course is intended for people who have a basic understanding of Microsoft Windows.

**Prerequisites:**

To ensure your success, knowledge of basic and intermediate features of Access tables, relationships, and queries, forms, and reports is recommended.

Microsoft Office Access 2010: Level 1

Microsoft Office Access 2010: Level 2

**Course Length:** 1 day **(CLIN-MSC-17)**

# Microsoft Office Access 2010: Level 4

You will exchange data with other applications, automate business processes by using VBA code, and secure and share databases.

**Upon successful completion of this course, students will be able to:**

* Share Access data with other applications.
* Use VBA to automate a business process.
* Create and modify a database switchboard and set the startup options.
* Secure and distribute databases.
* Share databases using a SharePoint site.

**Target Participants:**

This course is designed for students who have a thorough understanding of the basic and advanced user features of the Microsoft® Office Access® 2007 application, and are interested in learning introductory level administrator skill sets. The course is also for students who may be working in a web-based environment and may need to adapt Access applications to the environment.

**Course Length:** 1 day **(CLIN-MSC-18)**

# Microsoft Office PowerPoint 2010: Level 1

You will explore the PowerPoint environment and create a presentation. You will format text on slides to enhance clarity. To enhance the visual appeal, you will add graphical objects to a presentation and modify them. You will also add tables and charts to a presentation to present data in a structured form. You will then finalize a presentation to deliver it.

**Upon successful completion of this course, students will be able to:**

Identify the components of the PowerPoint 2010 interface.

Create a presentation.

Format text on slides.

Add graphical objects to a presentation.

Modify graphical objects in a presentation.

Work with tables in a presentation.

Add charts to a presentation.

Prepare to deliver a presentation

**Target Participants:**

This course is intended for people who have a basic understanding of Microsoft Windows.

**Prerequisites**

Students should have completed the following courses or possess equivalent knowledge before starting with this course:

• Microsoft Office Windows XP Introduction

• Microsoft Office Windows XP Professional Level 1

• Microsoft Office Windows XP Professional Level 2

• Microsoft Office Windows 2000 Introduction

**Course Length:** 1 Day **(CLIN-MSC-19)**

# Microsoft Office PowerPoint 2010: Level 2

You will enhance your presentation by using features that will transform it into a powerful means of communication. You will customize the PowerPoint interface to suit your requirements and use features to create dynamic and visually appealing presentations. You will then finalize a presentation and secure it to authenticate its

validity.

**Upon successful completion of this course, students will be able to:**

Customize the PowerPoint environment.

Customize a design template.

Add SmartArt graphics to a presentation.

Add special effects to a presentation.

Customize a slide show.

Collaborate on a presentation.

Secure and distribute a presentation

**Target Participants:**

To ensure your success, we recommend that you first take introductory courses, such as

Microsoft Office PowerPoint 2010: Level 1, or have equivalent knowledge and skills

**Course Length:** 1 day **(CLIN-MSC-20)**

# Microsoft Publisher 2010

You will create, format, edit, and distribute publications.

**Upon successful completion of this course, students will be able to:**

Get familiar with the Publisher 2010 environment and start working on a publication.

Modify the layout and structure of a publication.

Format text in a publication.

Edit the contents in a publication.

Format graphics in a publication.

Prepare a publication for distribution

**Target Participants:**

This course is intended for people who have a basic understanding of Microsoft Windows.

**Prerequisites:**

To ensure success, we recommend that students first take one of the following introductory courses, or have equivalent knowledge and skills.

Windows XP Professional: Level 1

Windows XP Professional: Level 2

Windows 7: Level 1

**Course Length:** 1 Day **(CLIN-MSC-21)**

# **Loan Program Descriptions**

# BUSINESS WRITING

Most professionals are required to write as part of their job, but often find drafting, writing, and editing documents time-consuming and frustrating. The overriding goal of this fundamental skills workshop is to help experienced writers create and edit mistake-free business documents with greater clarity, economy, and speed.

**Upon successful completion of this course, students will be able to:**

Participants learn to plan, organize, and structure documents for maximum effect, to determine the appropriate language, style, and tone for each document, to use clear and concise language, to avoid major grammatical errors, reduce the time spent preparing and writing documents, to proofread material and collaborate with others to create clear documents and basic punctuation, grammar, and spelling. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

**Target Participants:**

All Loan Programs Office staff

**Course Length:** 1 day **(CLIN-CD-07)**

# PROJECT MANAGEMENT FOR EVERYONE & CUSTOMER SERVICE

This fundamental skills workshop will consist of two sessions. A morning session where participants learn about the primary aspects of project management, essentially: project planning, teambuilding and effective leadership, and project execution. Discussion will focus primarily on the following concepts: scope management, cost management, communication management, procurement management, crisis management, project audit, and effective team work. And, an “afternoon session” largely devoted to customer service training through the use of best practices, case studies, role-plays, etc.

**Target Participants:**

All Loan Programs Office staff

**Course Length:** 1 day **(CLIN-LPO-01)**

# PRESENTATION SKILLS

When you have important data to present to others—information that summarizes an analysis you’ve done, or some other significant message that conveys data—your story is only as powerful as your presentation. Data visualizations, interactive dashboards and infographics are extremely powerful tools for presenting data in a clear, meaningful and compelling way. The best visualizations can capture an audience’s attention and provide instant clarity. This this fundamental skills workshop will give you an overview of data visualization techniques, as well as a hands-on approach to using Microsoft Excel, PowerPoint and other business analytics software to present your data and message in the most effective manner possible.

**Upon successful completion of this course, students will be able to:**

You’ll learn how to choose just the right form for presenting your content, rather than just picking a general template that does not do justice to your work—and achieve greater credibility and professionalism through your presentations.

**Target Participants:**

All Loan Programs Office staff

**Course Length:** 1 day **(CLIN-CD-03)**

# TROUBLED / DISTRESSED ASSETS

This fundamental skills workshop is designed to provide PMD participants with a synopsis of the loan restructuring process and key issues for the secured creditor in three phases: Pre-default and assessment of the situation; restructuring negotiations; and implementation.

**Target Participants:**

Project Managers (Asset Monitoring & Supervision), Portfolio Monitoring Associates, Special Asset Officers, all other PMD, all LPO All Loan Programs Office staff

**Course Length:** 1 day **(CLIN-LPO-02)**

# INTRODUCTION TO FINANCIAL MODELLING

This fundamental skills workshop that provides a solid foundation in designing / constructing robust and reliable financial models and in the use of many of the useful support tools in a spreadsheet program.

**Upon successful completion of this course, students will be able to:**

Participants will be able to: design and construct useful and robust financial modeling applications; learn financial forecasting; use support tools and techniques in spreadsheet programs; and utilize sensitivity and scenario analysis.

**Target Participants:**

All Loan Programs Office staff

**Course Length:** 1 day **(CLIN-LPO-03)**

# PROJECT FINANCE

This fundamental skills workshop will explain Credit Risk, its components, and its drivers. Major concepts pertinent to credit analysis will be discussed including borrower analysis, monitoring credits (strengths and weaknesses of cash flow, financial ratios; cash flow predictors), and early warning signs.

**Target Participants:**

Portfolio Management Associates, Project Managers (refresher), other Portfolio Management Division Staff, all Loan Programs Office staff.

**Course Length:** 1 day **(CLIN-LPO-04)**

# CUSTOMER SERVICE: FOLLOW UP – SURVEY

Fundamental skills workshop based on Customer Service Survey implemented as part of PMD’s Strategic and Operational Planning. Using survey results will help to provide a training workshop that is highly targeted to PMD’s and LPO’s customer service needs.

**Target Participants:**

All Portfolio Management Division Staff, all Loan Programs Office and staff.

**Course Length:** 1 day **(CLIN-LPO-05)**

# FINANCIAL STATEMENT & CREDIT ANALYSIS

This fundamental skills workshop focuses on new LPO hires and on LPO Staff in need of refresher training. It covers the topics already taught at the Financial Statement Analysis and the Intro. to Credit Analysis, including: 1) ; it specifically: 1) description of key terms in accounting and the traditional concepts of financial statement analysis (balance sheet; income statement; cash flow statement; GAAP and IFRS); 2) review of key financial ratios used in determine a company’s financial health and introduce concepts, such as cash flow analysis and how this type of analysis is used to understand borrower’s loan repayment capability; 3) explanation of Credit Risk, its components, and its drivers; and 4) discussion of major concepts pertinent to credit analysis, such as borrower analysis, monitoring credits (strengths and weaknesses of cash flow, financial ratios; cash flow predictors), and early warning signs.

**Target Participants:**

Portfolio Management Associates, Project Managers (refresher), other Portfolio Management Division Staff, all Loan Programs Office and staff.

**Course Length:** 1 day **(CLIN-LPO-06)**

# TROUBLED / DISTRESSED ASSETS (BANKRUPTCY)

This fundamental skills workshop helps participants to understand: the principal stages of descent to financial distress; the processes and challenges of debt reorganization, both in and out of court; the key features of bankruptcy regimes and the protection and dangers they bring to creditors; the negotiation and development of a reorganization plan; and alternatives and strategies for restructuring debt and maximizing recovery.

**Target Participants:**

Project Managers (Asset Monitoring & Supervision), Portfolio Management Associates, Project Managers (refresher), and Special Asset Officers, other Portfolio Management Division Staff, all Loan Programs Office and staff.

**Course Length:** 1 day **(CLIN-LPO-07)**

# TIME MANAGEMENT/ ORGANIZATIONAL SKILLS

This This fundamental skills workshop helps participants to understand: the principal stages of descent to financial distress; the processes and challenges of debt reorganization, both in and out of court; the key features of bankruptcy regimes and the protection and dangers they bring to creditors; the negotiation and development of a reorganization plan; and alternatives and strategies for restructuring debt and maximizing recovery.

**Target Participants:**

All Portfolio Management Division Staff, all Loan Programs Office and staff.

**Course Length:** 1 day **(CLIN-LPO-08)**

# TROUBLED / DISTRESSED ASSETS (RESTRUCTURING)

This fundamental skills workshop is designed to provide PMD participants with s a synopsis of the loan restructuring process and key issues for the secured creditor in three phases: Pre-default and assessment of the situation; restructuring negotiations; and implementation. Some PMD staff has already attended this presentation.

**Target Participants:**

All Portfolio Management Division Staff, all Loan Programs Office staff.

**Course Length:** 1 day **(CLIN-LPO-09)**

# CREDIT RISK ANALYSIS

An intermediate/advanced level in-house seminar focused on understanding the qualitative issues before performing the quantitative analysis. After an historical risk analysis is carried out, participants perform financial forecasting, which determines correct structuring. Participants also explore financing alternatives including options in money and capital markets, seniority, protection and monitoring, holding company analysis, subordination, covenants and off-balance sheet items. Class includes ample opportunities to practice the analytical techniques learned in each section. Main focus is corporate analysis.

**Target Participants:**

All Portfolio Management Division Staff, all Loan Programs Office and staff.

**Course Length:** 2-3 days **(CLIN-LPO-10)**

# LEADERSHIP DEVELOPMENT

Leaders can be found at all levels of an organization, regardless of title or role. This course explores how to identify leadership opportunities and how to use one’s natural strengths to take on important leadership roles within one’s organization.

**Upon successful completion of this course, students will be able to:**

Participants will enhance their leadership skills by learning the six focus areas for leadership and management: Self-Management, Organization Awareness, Problem Solving and Decision Making, Working in Teams, Building Relationships and Managing Change. This in-house course is designed for individuals who are not in managerial positions but who need to get work done through others.

**Target Participants:** All LPO Portfolio Management Division Staff (non-manager), all Loan Programs Office managers (refresher).

**Course Length:** 2-3 days **(CLIN-LPO-11)**

# ADVANCED RISK MANAGEMENT

This in-house course reviews the basic topics before covering in detail the advanced concepts and applications of risk management. Participants also discuss the impact of technology development and how new technology risk affects the typical project. The course also addresses representative project risk management software risk analysis tools, and uses two large capital and operating dollar projects to enhance the learning through case study work.

Based on provider selection, this training can also be tailored cover the key risks faced by banks and how these risks are addressed by regulators under Basel II & Basel III, and internal economic capital models. Course also includes an overview of lessons learned and best practices for identifying, monitoring and managing risk.

**Target Participants:**

All LPO Portfolio Management Division Staff, All LPO Risk Management Division Staff.

**Course Length:** 2-3 days **(CLIN-LPO-12)**

# FINANCIAL MODELLING (INTERMEDIATE/ADVANCED)

This in-house course covers 1) basic financial modelling (e.g., projection of P&L, balance sheet and cash flow; professional use of excel -protection, range names, data validation; useful functions (IF, MAX, MIN, NPV, IRR) and effective short keys); 2) professional models, from basic to professional, including scenario analyses, sensitivity testing; 3) building models from scratch; 4) review of valuation concept (refresher, practical applications, key value drives, etc.); 5) additional applications of integrated financial models (e.g., how to expand your model for additional analysis including: discounted cash flow, leveraged finance, etc.); and 6) LBO modelling concept. Each section includes training exercises.

**Target Participants:**

All LPO Portfolio Management Division Staff, all Loan Programs Office staff.

**Course Length:** 2-3 days **(CLIN-LPO-13)**

# EFFECTIVE COMMUNICATION

Based on best practices covered in courses taught to Wall Street financial institutions, this in-house this program comprises: communications training; communication model training; verbal communication training; non-verbal communication training; listening training; feedback training; and communication strategies training.

**Target Participants:**

All LPO Portfolio Management Division Staff, all Loan Programs Office staff.

**Course Length:** 2-3 days **(CLIN-LPO-14)**

# CREDIT PORTFOLIO MANAGEMENT

Intermediate-level workshop that teaches participants: 1) the fundamental concepts of credit risk (e.g., traditional/current credit risk: default and credit migration; categories of credit risk; differing approaches under Basel Framework, US GAAP, IFRS, internal models and market practices (e.g. ISDA agreements); 2) the techniques used to manage and measure credit risk within a portfolio and to understand the key drivers of credit risk; 3) the risk management strategy (including portfolio management objectives: balancing risk appetite and diversification to maximize risk adjusted returns; diversification, granularity and correlation concepts; contagion risk; techniques to spread risk; credit default swaps; and practical issues and uncertainties to consider when managing credit risk (e.g., liquidity, basis and wrong way risk); 4) the measurement of Portfolio Risk (portfolio credit risk vs. single credit risk; credit risk loss distributions: quantifying expected and unexpected losses; contrasting credit and market risk measurement; key drivers of credit risk); 5) reviews of key types and approaches of credit portfolio models; and 6) scenario and sensitivity analysis. Several case studies are used during the training.

**Target Participants:**

Portfolio Management Associates, Project Managers (refresher), other Portfolio Management Division Staff, all Loan Programs Office staff.

**Course Length:** 2-3 days **(CLIN-LPO-15)**