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Federal Grants and Financial Assistance courses

Advanced Cost Principles for Federal Financial Assistance

The cost principles governing grants and Federal financial assistance instruments are complex, with many special cases, exceptions, and different requirements depending on the type of organizations receiving the grants (especially institutes of higher education, non-profits, hospitals, state/local governments, or Indian tribes). This course is designed for personnel involved in the administration and management of Federal grants and other financial assistance instruments. It includes a strong focus on evaluating and negotiating indirect cost rates and cost allocation plans. This course can be customized to meet organization-specific policies and procedures.

Topics include:

- Review of general cost principles, direct and indirect costs, allowable and unallowable costs
- Applicability and application of cost principles
- Cost accounting standards and cost allocation and credits
- Statutory limits
- Required certifications
- Cost allocation plans and indirect cost proposals
- Special cases

Course Format: 2-day instructor-led classroom delivery or webinar format

Assistance Agreements: Appropriation Law

This hands-on workshop provides Federal staff with a working knowledge of appropriations law as it applies to grant and federal financial assistance programs. Participants work with The Red Book (Principles of Federal Appropriations Law) and learn how the budget process impacts the implementation and administration of Federal grants, including knowing when appropriated funds are available. Participants will review terminology, court cases, GAO decisions, and statutes relating to issues such as First Amendment limits on congressional authority and lapse of budget authority, and explore how an agency identifies and deals with availability requirements, timing obligations, and cost sharing. The course includes extensive discussion on participants' specific questions and issues.

Topics include:

- Overview of federal appropriations law
- Applicability of requirements to federal grants and financial assistance agreements
- Review of key GAO decisions and court cases
- Rules addressing funds availability requirements, timing obligations and cost sharing

Course Format: 2-day instructor-led classroom delivery

Auditing Federal Grants and Federal Financial Assistance Agreements

This course provides training on the entire audit life-cycle for personnel involved in the administration and management of Federal grants and other financial assistance instruments. Participants learn how to: identify audit requirements that impact Federal assistance awards; understand the roles,

responsibilities, and relationships of all those involved in audits; have the foundational knowledge to prepare for a Single Audit; and review an audit report to identify and resolve findings.

The course is largely based on 2 CFR Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, Subpart F, *Audit Requirements*. This course can be customized to address organization-specific cost policies and procedures.

Topics include:

- Roles and responsibilities related to program management and auditing
- Relationship between cost principles and auditing
- Determining the need for and scope of an audit
- Reporting, monitoring and documentation
- Review of the Federal Audit Clearinghouse
- Management decisions, remedies and sanctions in response to audit findings

Course Format: 2-day instructor-led classroom delivery or webinar format

Cooperative Agreements and Substantial Involvement

In this course, participants gain in-depth experience with cooperative agreements and understand how they differ from other award options. Participants discuss how to establish parameters for an awarding agency's involvement, including monitoring and liability considerations. This course has been designed for personnel involved in the administration and management of Federal grants and other financial assistance instruments. This course can be customized to meet organization-specific policies and procedures.

Topics include:

- Background of financial assistance including statutes and Executive Orders
- Distinctions between procurement and financial assistance
- Distinctions between grants and cooperative agreements
- Applicability of the concepts of substantial involvement and Federal stewardship
- Uses of cooperative agreements and substantial involvement

Course Format: 1-day instructor-led classroom delivery or webinar format

Cost Principles for Federal Financial Assistance Agreements

This course provides training to grants management and other financial assistance personnel on the cost principles found at 2 CFR Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, Subpart E, *Cost Principles*. Allowable and unallowable costs are discussed along with indirect cost rates, and their calculation and importance. This course can be customized to address organization-specific cost policies and procedures.

Topics include:

- Cost principles
- Direct vs. indirect costs
- Importance of the indirect cost rate
- Calculating and evaluating indirect cost rates

- Allowable vs. unallowable costs
- Summary of the 54 cost categories
- Special cost issues for institutions of higher education, non-profits, state/local government

Course Format: 2-day instructor-led classroom delivery or webinar format

Developing and Initiating Federal Grants and Other Financial Assistance Instruments

This course provides fundamental training in processes and requirements for announcing, developing, and initiating a Federal grant, cooperative agreement, or other Federal financial assistance agreements. The course focuses on 2 CFR Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, Subparts A, B, and C. This course has been designed for personnel new to Federal grants and financial assistance administration and management, or experienced personnel who wish to learn about changes from previous Federal grants management policy and practice. This course can be customized to address organization-specific policies and procedures.

Topics include:

- Types of Federal financial assistance agreements
- The Notice of Funding Opportunities requirements and data
- Mandatory Non-Federal Entity (NFE) disclosures
- The risk review process and requirements
- Mitigating identified risks
- Assessing pre-award costs
- Overview of cost principles
- Award reporting

Course Format: 2-day instructor-led classroom delivery or webinar format

Ethics Considerations in Federal Financial Assistance

Federal financial assistance programs pose some potential unique ethics situations. This course exposes participants to those situations and offers guidelines as to how to evaluate and address them. This course has been designed for personnel involved in the administration and management of Federal grants and other financial assistance instruments. This course can be customized to address organization-specific ethics considerations.

Topics include:

- Evaluation and selection process
- “At arms-length” definition and applicability
- Fair cost-sharing
- Allowable costs
- Awardee personnel compensation
- Federal vs. local laws

Course Format: 1-day instructor-led classroom delivery or webinar format

Federal Financial Assistance

This course gives the participant a foundation in the processes and applications of Federal financial assistance. Through a combination of lectures, discussions, and practical exercises, participants become familiar with the concepts of financial assistance, the types of awards that are possible, the process by which financial assistance is awarded, requirements associated with these instruments, and establishment of award details. At several points in the course, exercises will provide an opportunity for participants to apply key concepts to their own roles as grants managers. The course also includes a detailed discussion of the agency-specific requirements that supplement 2 CFR Part 200 upon request.

Topics Include:

- Types of assistance
- Selection process
- Award of funds
- Award requirements
- Cost Principles
- Termination
- Closeout
- Audit requirements

Course Format: 5-day instructor-led classroom delivery or webinar format

Federal Financial Assistance Law

In addition to 2 CFR Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* and its various appendices, there are a variety of other laws and regulations that govern the awarding, initiation, monitoring and closing of grants and other financial assistance mechanisms. This course covers these additional requirements, focusing on those legal requirements summarized in the GAO report, *Appropriations Law, Vol II, Chapter 10, Federal Assistance: Grants and Cooperative Agreements*. This course has been designed for personnel involved in the administration and management of Federal grants and other financial assistance instruments. This course can be customized to meet organization-specific policies and procedures.

Topics include:

- Basic legal concepts related to types of grants vs. contracts
- Contracting by awardee
- Funds appropriations restrictions
- Cash management and case advances
- Program income
- Cost sharing
- Allowable vs. unallowable costs
- Applicable environmental, labor and equal opportunity laws

Course Format: 2-day instructor-led classroom delivery

Federal Funds Management: Evaluating Risk and Auditing Performance

This course provides training on how to determine whether a potential award recipient has a financial management system adequate for managing Federal funds, and whether they are financially capable of performing the work. It also addresses how to monitor funds expenditures and introduces participants to financial auditing processes and requirements. This course has been designed for personnel involved in the administration and management of Federal grants and other financial assistance instruments. This course can be customized to address organization-specific policies.

Topics include:

- Awardee financial management system requirements
- Financial viability analysis
- Single and program-specific audits and determining when an audit is required
- Roles and responsibilities during the audit process
- Financial and audit reporting
- Management decisions and appeals

Course Format: 2-day instructor-led classroom delivery or webinar format

Financial Assistance Agreement Closeout

Closeout of grants and other financial assistance agreements is often overlooked in the funds management process. However, formal closeout is important for ensuring orderly closeout of administrative and financial documents, verification of final disbursements and financial reports, and proper accounting for all personal, real, and intellectual property. This course has been designed for personnel managing Federal grants or other financial assistance awards.

Topics include:

- Planning for closeout during the initial award
- Collecting reports and deliverables
- Finance and performance reviews
- Accounting for and dispositioning personal, real, and intellectual property
- Documenting lessons learned

Course Format: 2-day instructor-led classroom delivery or webinar format

Making the Transition from Financial Assistance in OMB Circulars to 2 CFR Part 200

This course transitions participants from the Federal financial assistance policies and procedures in eight OMB circulars to the 2014 regulations at 2 CFR Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*. This course compares the two and emphasizes significant differences and changes. This course has been designed for personnel involved in the administration and management of Federal grants and other financial assistance instruments, especially those that have been trained and are experienced in implementing and managing grants

prior to the promulgation of 2 CFR Part 200. This course can be customized to meet organization-specific policies and procedures.

Topics include:

- Fixed-price and “pay for performance” grants
- Reporting and accounting practices
- Allowable costs
- Indirect cost rates
- Oversight provisions
- Audit requirements
- Cost sharing requirements

Course Format: 2-day instructor-led classroom delivery or webinar format

Making the Transition from OMB Circulars for Financial Assistance to 2 CFR Part 200 and Part 910 for Department of Energy

This highly customized course transitions participants managing financial assistance agreements at the Department of Energy (DOE) from the set of Federal financial assistance policies and procedures covered in a series of eight OMB circulars to the regulations at 2 CFR Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, promulgated on December 26, 2014. This course compares the two and emphasizes significant differences and changes. The course also addresses DOE’s specific requirements in the 2 CFR Part 910 supplemental regulations.

Topics include:

- Fixed-price and “pay for performance” grants
- Reporting and accounting practices
- Allowable costs
- Indirect cost rates
- Oversight provisions and audit requirements
- Cost sharing requirements
- Requirements unique to Department of Energy financial assistance agreements

Course Format: 2-day instructor-led classroom delivery or webinar format

Managing and Monitoring Federal Grants and Other Financial Assistance Instruments

This course provides fundamental training in the processes and requirements for monitoring and managing Non-Federal Entity (NFE) technical and financial performance and the specific requirements in 2 CFR Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, Subpart D. This course has been designed for personnel new to Federal grants and financial assistance administration and management, or experienced personnel that wish to learn about changes from previous Federal grants management policy and practice. This course can be customized to address organization-specific policies and procedures.

Topics include:

- Statutory and policy requirements
- Performance measurement and financial management monitoring and reporting
- Compliance with award terms and conditions and non-compliance remedies
- Allowable cost-sharing
- Real property and equipment acquisition and disposition
- Procurement standards, requirements, monitoring, and reporting
- Overview of auditing
- Closeout procedures

Course Format: 3-day instructor-led classroom delivery or webinar format

Negotiating Federal Financial Assistance Agreements: Reaching Fair Consensus

This course helps participants gain the skills to negotiate with Non-Federal Entities (awardees). The course also includes foundational information on Federal financial assistance initiation and management requirements that commonly result in negotiations between the awardee and the awarding Federal agency. This course has been designed for personnel involved in the administration and management of Federal grants and other financial assistance instruments, especially those involved in negotiating the parameters of the initial agreement between the awardee and the awarding Federal agency, or in reviewing and approving awardee indirect cost rates. This course can be customized to address organization-specific policies and procedures.

Topics include:

- Basic negotiation principles and techniques
- Negotiating performance metrics
- Negotiating allowable costs
- Negotiating indirect cost rates
- Special issues for institutions of higher education, non-profits, state/local government and Indian Tribes, and hospitals.

Course Format: 1-day instructor-led classroom delivery or webinar format

Overview of National Grants Policy and Law

Although 2 CFR Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* forms the backbone of Federal financial assistance policy and law, grants-awarding agencies and grants recipients must also comply with other Federal policies, statutes and regulations. This two-day course provides an introductory overview of these requirements. This course has been designed for Federal personnel involved in the administration and management of Federal grants and other financial assistance instruments. This course can be customized to address organization-specific policies and applicable regulations.

Topics include:

- Overview of Federal grant and financial assistance policy, law and regulations
- Labor laws and standards
- Civil rights
- Lobbying restrictions
- Ethics and integrity in grants
- Procurement requirements
- Suspension and debarment
- National Environmental Policy Act (NEPA) and other environmental requirements
- Patent rights

Course Format: 2-day instructor-led classroom delivery

ACQUISITION AND CONTRACT MANAGEMENT COURSES

Acquisition Management for Technical Personnel

Because of the Federal Government's special fiduciary relationship, the acquisition system established to manage the expenditures of taxpayer monies differs from commercial transactions between private parties. The principle purpose of a Federal acquisition system is to deliver on a timely basis the best value product or service to the customer while adhering to US laws, regulations, policies, and directives. This course examines the portion of the acquisition process commonly referred to as "procurement." Procurement typically begins with the completion of the acquisition strategy and the development of the acquisition plan, and proceeds through development of a solicitation, solicitation and evaluation of proposals, and contract award.

Topics include:

- Acquisition authority in the Federal Government
- Government procurement standards
- Acquisition planning and methods
- Contract types
- Solicitation process
- Contract negotiations and administration
- Special topics related to the Department of Energy's unique Management and Operating (M&O) contracts

Course Format: 4-day instructor-led classroom delivery or webinar format

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Commercial Item Acquisition

The streamlined process for acquiring commercial items can save project time and money, but it requires a nuanced understanding of FAR Part 12 to be effective. Participants learn how to determine what is a commercial item and follow a more efficient and cost-effective acquisition strategy. Participants also identify the difference in the process for noncommercial acquisitions, from requirements definition to contract award, and learn how to issue a solicitation for commercial items and award the contract.

Topics include:

- Federal Acquisition Regulation (FAR) provisions as applied to commercial item acquisition
- Categories of commercial items and services
- Fundamentals of market research
- Requirements definitions
- Solicitation process for commercial items
- Commercial item terms and conditions

Course Format: 2-day instructor-led classroom delivery

Contract Administration for Technical Representatives (COR)

This course is designed to help Contracting Officers Representatives (CORs) with technical or functional expertise, but little formal acquisition training or experience, understand 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:

- COR role and responsibilities
- Relationships among CORs, Contracting Officers, and contractors
- Ethical standards and procurement integrity
- Tools and techniques for effective contract management
- Contract modifications
- Contract options
- Contractor performance monitoring
- Contract closeout and termination

Course Format: 3-day instructor-led classroom delivery

COR Training Refresher

This course is designed to review the COR's responsibilities in the acquisition process and provides the opportunity for CORs to discuss challenges and experiences they have encountered in their roles as CORs. The course also includes discussions of Federal acquisition and contract management processes and presents information on new trends, issues, and concerns in Government procurement.

Topics include:

- The COR's role and responsibilities
- Ethical standards
- Types of contracts and how they differ in use and implementation
- Key challenges and lessons learned

Course Format: 1-day instructor-led classroom delivery

Department of Energy Acquisition Regulations (DEAR) Fundamentals

This course is designed for newly hired GS-1102 contracting personnel to the Department of Energy (DOE), contracting personnel recently transferred from another Federal agency, and other personnel who are knowledgeable about the Federal Acquisition Regulations (FAR) but want to learn more about the Department of Energy Acquisition Regulations (DEAR) supplement to the FAR. The course introduces the DEAR requirements and begins by answering the "who, what, when, where, why, and how" of the DEAR's structure and relationship to the FAR. Through the use of scenarios and facilitated discussions, participants learn how to use the DEAR in conjunction with the FAR, and how to access other available DOE acquisition resources (acquisition intranet, policy flashes etc.).

Topics include:

- Governance fundamentals
- DEAR fundamentals and regulatory requirements
- Acquisition planning
- Contracting methods and requirements
- Socioeconomic programs
- Special categories of contracting
- Contract management

Course format: 3 instructor-led classroom delivery

Department of Energy Acquisition Regulations (DEAR): Special Topics

This course provides instruction and guidance in six special topic areas relevant to Department of Energy (DOE) contracting. The course is designed for Contracting Officers (COs), Contracting Officer Representatives (CORs) and others requiring knowledge of DOE contracting practices. The course is not designed to meet CO or COR basic Federal Acquisition Regulations (FAR) training requirements. Participants should have completed a basic CO class before taking this course.

Topics include:

- DEAR refresher with a focus on Management and Operating (M&O) contracts
- Roles and responsibilities of CO, CORs and contractors regarding technical direction
- Contract modifications and extensions
- Contract types most appropriate for a given DOE product or service
- Overall contract type for contracts with multiple CLINs

Course Format: 1-day instructor-led classroom delivery or webinar format

Government Contract Law

This course provides a broad understanding of the structure, extent and limitations of government contract law, and the related authorities and responsibilities of Federal Contracting Officers and their representatives. Key concepts include:

Topics 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
- Types of contracts, subcontracting, and contract administration and performance
- Legal remedies for bidders, contractors and government
- Roles of the GAO and the US Court of Federal Claims.

Course Format: 5-day instructor-led classroom delivery

Introduction to the Purchase Card Program

This course is specifically designed to instruct first-time users of the Government Purchase Card (P-Card) in what to do and what not to do as cardholders. Participants learn the basic concepts of Government contracting and accountability, and how to use the GSA “SmartPay” program for individual purchases to provide timely, cost effective support, while maintaining appropriate attention to fiduciary duties. Participants also learn about the responsibilities and ethical considerations associated with using the P-card through course exercises and discussions.

Topics include:

- Overview of simplified acquisition procedures (SAP)
- Use of the purchase card
- GSA “SmartPay2” process
- Ethics, integrity and P-Card abuse
- Conditions, prohibitions and restrictions

Course Format: 2-day instructor-led classroom delivery

Introduction to the Purchase Card Program Refresher

This course is designed as a refresher for employees who have already completed the 2-day *Introduction to Purchase Card Program* course on purchase card delegation/appointment.

Topics include:

- Refresher on simplified acquisition procedures (SAP)
- GSA “SmartPay2” process
- Ethics, integrity and P-Card abuse
- Conditions, prohibitions and restrictions

Course Format: 1-day instructor-led classroom delivery

Managing Contract Changes

This course is designed to better prepare Contracting Officers (COs) and technical managers to manage project changes on complex projects through effective management of contract modifications and change orders. 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 a Federal agency. The course discusses the historical and current contracting environment, the doctrine of constructive change, potential differences between project management changes and contract changes, and tips for improving the effectiveness of the change management process.

Topics include:

- Types of contract modifications
- Negotiation of Equitable Adjustment (REAs)
- Cost analysis and evaluation of changes
- Contract vs. project changes

- Contracting financing issues
- Change control responsibilities
- Disputes and appeals

Course Format: 4-day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Managing Department of Energy's Management and Operating (M&O) Contracts

The Department of Energy (DOE) uses a unique type of contract called a Management and Operating (M&O) contract. This course is designed for Contracting Officers who manage M&O contracts, contracting specialists who do not have M&O contracts experience, and procurement analysts who review and support M&O contracts. This course provides a high-level overview of selected contract elements concerning DOE's M&O contracts and their unique aspects, describes the M&O contract form and explains the differences between M&O contracts and other FAR-based contracts. Participants also discuss contract administration lessons learned and additional site-specific topics.

Topics include:

- History and evolution of DOE's M&O contracts
- Key terms and conditions of M&O contracts
- Key contract clauses in M&O contracts

Course format: 4-day instructor-led classroom delivery or webinar format

Performance-Based Management Contracting

This course helps program and project managers, and contracting personnel, to better understand how to manage performance-based contracts. The course addresses the processes by which performance-based management contracts are planned, awarded, and managed after award. The course focuses on the performance-based concepts and tools required in each aspect of the planning, award, and post award processes. This course includes a special focus on major site and facility contracts and the unique challenges involved in making them performance-based.

Topics include:

- Writing Performance Work Statements and Statement of Objectives
- Contractor selection
- Post-award orientation
- Measuring and managing performance
- Communications and relationship building
- Integration of project and contract change process

Course Format: 3-day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Reimbursable Agreements

This course addresses reimbursable agreements (RAs) at the Federal level. It covers principles of law that apply to all Federal agencies, unless a specific agency has alternative statutory authority. Agency-specific issues are incorporated into classroom discussion.

Topics include:

- Statutory authorities
- Types of reimbursable agreements
- Planning and managing RAs
- Content of RAs
- Cost accounting
- Reporting

Course Format: 2 -day instructor-led classroom delivery

Requirements Definition and Acquisition Approaches for Mission Success

This five-day workshop is an opportunity for Contracting Officers, Contracting Officer Representatives, procurement staff, and project and programs managers involved in pre-award, award, and post-award of contracts to increase their skills in writing and managing firm-fixed price (FFP) and hybrid (mixed FFP and cost reimbursable (CR) CLIN) contracts. Participants learn how to: select the best contracting format for meeting the desired technical objectives; develop and write performance-based requirements; and manage different types of contracts. The course emphasizes the benefits and expected outcomes of using hybrid contracts and discusses how to determine if and when specific work can be competed as separate contracts. Exercises provide hands-on experience in evaluating and converting traditional cost reimbursable contracts into firm fixed-price and hybrid contracts.

Topics include:

- Selection of contract types
- Requirements development for performance-based service contracts
- Writing Performance Work Statements (PWS) and Statement of Objectives (SOO)
- Quality Assurance Surveillance Plans
- Indefinite Delivery/Indefinite Quantity (ID/IQ) contracts and Basic Ordering Agreements (BOA)
- Managing hybrid contracts
- Contract changes and Requests for Equitable Adjustments (REA)

Course Format: 5-day instructor-led classroom delivery

Service Contract Labor Standards

The Service Contract Labor Standards statute determines the wages that Federal contractors must pay their employees. During this course participants learn the Department of Labor (DOL) regulations that govern it, and how it applies to the acquisition process. Participants examine portions of the law, DOL implementing regulations, Administrative Review Board decisions, and wage determinations.

Topics include:

- History of the service contract labor standards statute
- Details related to service contracts and how they differ from other types of contracts
- Roles of Contracting Officers and Contracting Officers' Representatives in ensuring compliance with labor laws
- Implementing provisions of service contract labor standards laws

Course Format: 2-day instructor-led classroom delivery

Simplified Acquisition Procedures

This course addresses how to use the simplified acquisition procedures under Part 13 of the Federal Acquisition Regulations (FAR). This course helps contracting personnel and technical program staff understand when and how to take advantage of simplified acquisition procedures in purchasing goods and services for their agencies. Participants learn to distinguish between purchases that require competition and those that do not, and how to qualify purchases that can be non-competitive. The course describes the uses and attributes of a variety of procurement options including Standard Form (SF) 44, SF-182, Purchase Cards, Purchase Orders and Blanket Purchase Agreements. Participants learn when each one can be used, what procedures need to be followed regarding competition, and the advantages and disadvantages of each. Participants discuss a variety of scenarios and examples to reinforce their understanding of the different options available under simplified acquisition.

Topics include:

- Purpose of Simplified Acquisition under Part 13 of the FAR
- Methods that can be used under simplified acquisition procedures
- Criteria for selecting simplified acquisition method
- Standard forms for simplified acquisition

Course Format: 1-day instructor-led classroom delivery

Types of Contracts

This course introduces participants to the various types of contracts employed in the Federal government. It discusses the 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.

Topics include:

- Basic principles and limitations for the use of fixed price and cost reimbursement contracts
- Cost and performance risk in contract type selection
- Selection of contract type
- Application of economic price adjustments
- Use of incentive and award fee compensation

Course Format: 2-day instructor-led classroom delivery

PROGRAM AND PROJECT MANAGEMENT COURSES

Advanced Concepts in Project Management

This course covers the concepts of project management at an advanced level of expertise and expands upon best practices in project management from Federal agencies and the private sector. The course introduces a variety of advanced topics and includes a research project for participants to practice applying these concepts. Participants make formal presentations of their research, allowing them to practice making persuasive well-founded arguments to multiple stakeholders on their projects.

Topics include:

- Project management competencies
- Quality management
- Project Definition Rating Index (PDRI)
- Project execution
- Financial management
- Lessons learned

Course Format: 5-day Instructor-led classroom delivery or webinar format

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Advanced Risk Management

This course provides participants with an advanced understanding of the concepts and applications of risk and opportunity management, building on the concepts included in the basic *Risk Analysis and Management* course. This course improves a project manager's ability to develop and execute project risk management plans and to oversee the risk management activities of their contractors if applicable. 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 uses two complex construction projects to enhance the learning through case study work.

Topics include:

- Understanding and analyzing key elements of risk
- Managing risks during contracting and acquisition
- Government contingency and contractor management reserve provisions in contracting
- Contingency management
- Special risk topics

Course Format: 3.5 day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Breaking the Code: Understanding Project Management

This course introduces participants to the basic principles and concepts of the discipline of project management, and how mastery of these concepts can improve their performance on project teams.

Topics include:

- Key phases of the project management life cycle
- Key responsibilities and duties of members of a project management team
- Project management techniques to help meet their project objectives
- The role baselines and performance-based objectives play in managing projects

Course Format: 3-day instructor-led classroom delivery

Budgeting and Funding for Department of Energy Capital Asset Projects

This course is specifically designed to provide Department of Energy's (DOE) Federal Project Directors with a foundational knowledge of capital planning for capital asset projects as required under the Department's DOE Order 413.3B and the federal budget process. In this course, participants review capital planning questions they should ask when a non-information technology capital asset project subject to the Order is in each critical decision (CD) 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.

Topics include:

- Federal budgeting and funding processes for capital asset projects
- DOE's acquisition management system
- The inter-relationship between the strategic planning, budgeting and funding processes of DOE's capital asset projects
- Project Data Sheets and the OMB Business Case for capital asset projects
- Key DOE roles in the strategic planning, budgeting and funding of capital asset projects

Course Format: 2-day instructor-led classroom delivery or webinar format

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

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).

Topics include:

- Relationship Between cost and schedule estimating
- Cost estimating methods including life-cycle costing
- Schedule development process
- Scheduling methods
- Documenting, reviewing and validating estimates and schedules
- Sensitivity risk and uncertainty analysis

Course Format: 5-day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Earned Value Management Systems (EVMS)

This course addresses how to effectively apply Earned Value Management (EVM) approaches in project management. Participants learn about processes, how they are interrelated, and how they must be integrated to produce an effective EVMS.

Topics include:

- Plan project work;
- Monitor performance;
- Utilize work breakdown structures (WBS); and
- Collect and interpret earned value data.

Course Format: 3-day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Environmental Laws and Regulations

This course provides participants an overview and basic knowledge of environmental laws and regulations and Executive Orders. It also addresses sustainability goals including reducing energy use, enhancing pollution prevention, and conserving water. The course introduces participants to the wide range of environmental requirements that apply to government facilities and operations and the resources available to assist staff and managers if they are asked to support or manage a project with potential environmental impacts. This course is not meant to be an instruction manual for all environmental topics; rather, it aims to educate participants as to when to ask questions and to whom they should be directed.

Topics include:

- National Environmental Policy Act (NEPA) requirements
- Clean Water Act requirements
- Clean Air Act requirements
- Resource Conservation and Recovery Act (RCRA) waste management requirements
- Comprehensive Environmental Response, Compensation, and Liability Act (CERCLA), known as Superfund requirements

- Endangered Species Act requirements
- Sustainability goals and requirements
- Environmental Justice issues

Course Format: 3-day instructor-led classroom delivery or webinar format

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Front End Planning Requirements for Department of Energy Capital Asset Projects

Course Description: The Department of Energy (DOE) has a set of detailed requirements that apply to managing the acquisition of capital asset projects from the initiation of the project through project design, monitoring and execution, and closeout. This course provides DOE Federal Project Directors (FPDs) and Integrated Project Team (IPTs) members with the skills necessary to be successful upon initial assignment to a capital asset project. The course covers documentation typically available to the FPD upon initial assignment, "hand-off issues" from the program to the FPD, IPT selection and engagement, elements in the selection of a preferred alternative for Critical Decision (CD)-1, and other key elements of CD-1 documentation (e.g., Key Performance Parameters, Conceptual Design Report).

Topics include:

- DOE requirements, including documentation, that apply during front end planning
- Assembling the Integrated Project Team
- Conceptual design report
- Analysis of alternatives
- Key performance parameters
- Cost estimating
- Project Definition Rating Index (PDRI) and other planning tools

Format: 2-day instructor-led classroom delivery or webinar format

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Fundamentals of Federal Program Management

This course is designed for Federal program managers seeking a deeper understanding of the distinctions between projects and programs and program management techniques. The course covers the key responsibilities of a program manager and also addresses how to define risk and apply a risk management methodology in a program and project setting, how to interpret project performance data, and how to effectively address corrective action issues.

Course Topics:

- Overview of Federal program management
- Strategic planning

- Multi-year program planning
- Federal budget process
- Program implementation
- Program analysis and evaluation
- Project oversight
- Risk management
- Stakeholder management

Course Format: 3-day or 5-day instructor-led classroom delivery

Leadership in Energy and Environmental Design (LEED®)

This course provides participants with the knowledge of the LEED® rating system and the five LEED® categories to support the Federal mandates for agencies to improve their buildings' efficiency and environmental performance, including green building certification.

Topics include:

- Green building principles and the basics of LEED
- Building Design and Construction LEED Rating System, and foundations of the LEED certification process
- Operations and Maintenance LEED Rating System and foundations of the LEED certification process

Course Length: 2.5 day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Life Cycle Cost Estimating

This course covers 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 a decision analysis 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
- Rules for analyzing cost estimates to ensure proper incorporation of life cycle estimating principles and decision making
- A review of representative cost estimates to apply these skills

Course Format: 2-day instructor-led classroom delivery

Measuring Results from Training

Measuring results from training can be difficult. This course discusses a variety of approaches that are used to evaluate the impacts of training and to assess the benefits of training to the organization. The

course also provides participants with techniques for summarizing the results of these analyses and demonstrating the results that have been achieved through the training delivered.

Topics include:

- Kolb's learning styles and learning cycle
- Kirkpatrick's levels of evaluation
- Evaluation tools including goal setting, tests, reactionary sheets, interviews, observations, hip-pocket assessments, skill assessments, and learning journals
- Learning objectives and linkage to the evaluation process
- Training needs assessments
- Training evaluation plans

Course Format: 1-day instructor-led classroom delivery

Monitoring and Controlling Performance During Project Execution of Capital Asset Projects at the Department of Energy

This course provides advanced training on how to monitor and control the project execution phase of Department of Energy (DOE) capital asset projects subject to DOE Order 413.3B, *Program and Project Management for the Acquisition of Capital Assets*. The course covers DOE Federal Project Director (FPD) project execution responsibilities and tasks beginning with Critical Decision (CD)-3 approval (Approve Start of Construction/Execution) and continuing through CD-4 (Approve Start of Operations or Project Completion) and post-CD-4 project closeout. The course emphasizes lessons learned and best practices. This advanced class includes substantial discussion, case study analysis, and sharing experiences and lessons learned.

Topics Include:

- DOE regulations applicable to monitoring and control of capital asset projects during project execution
- Cost and funding
- Contract and budget administration
- Managing the technical work and schedule and Key Performance Parameters
- Management reserve and contingency
- Environmental, safety, health and safeguards and security

Course format: 3.5-day instructor-led course or webinar format

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Planning and Managing Project Test and Evaluation

This course provides a general overview of 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, using a series of case studies to reinforce the T&E basic process and steps applicable to all projects.

Topics 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
- Managing the T&E program

Course Format: 2-day instructor-led classroom delivery

Planning for Safety in Project Management

This course provided project managers with the knowledge needed to define and carry out integrated safety management and quality management 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 (FMEA) should identify potential hazards and mitigation strategies. Using a case study, this process examines nuclear, environmental, and worker safety issues in a representative project. Additionally, the course provides participants with the necessary information to ensure that all large-scale projects comply with the Department of Energy's additional standards of safety.

Topics include:

- Safety requirements throughout project acquisition life cycle
- Roles and responsibilities related to project safety
- Integration of safety into alternatives analysis and conceptual design
- Failure mode and effect analysis (FMEA)
- Environmental safety hazards
- Worker safety hazards
- Conducting hazards analysis

Course Format: 3.5-day instructor-led delivery or webinar format

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Program Management and Portfolio Analysis

Focusing on collaboration, defending resources, and creative compromise, the computer-based program management simulation and case study in this course helps participants learn how to develop a strategic view of projects. The simulation enables participants to gain hands-on experience planning, implementing, and coordinating multiple, complex projects across an organization.

Topics include:

- 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
- Applying project management methods in a complex project setting

Course Format: 5-day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Project Management Essentials

In this course, participants learn about the primary concepts of project management and are introduced to best practices in project management from 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), participants 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 are referenced throughout the course. The course is presented at an intermediate level of expertise similar to what would be expected of an accredited graduate level college course.

Topics include:

- Strategic planning
- Project initiation
- Acquisition strategy and procurement
- Risk planning
- Scope
- Cost and schedule
- Quality
- Project execution
- Project controls
- Leadership and effective communications

Course Format: 5-day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

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 project management 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.

Topics include:

- Up-front project definition in developing project scope
- Stakeholder alignment techniques
- Project Definition Rating Index
- Automated scheduling tools
- Schedule analysis, crashing, and resource-leveling

Course Format: 5-day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Project Management Systems and Practices in Department of Energy

With the responsibility to manage the country's nuclear infrastructure, fund and manage large-scale energy research and development projects, and manage complex environment cleanup projects, the Department of Energy (DOE) developed a detailed set of project management requirements that apply to managing these projects. This course instructs participants in the specific project management systems and practices required by DOE Order 413.3b for all capital asset projects in the Department. The course also explains the specific roles and responsibilities of a Federal Project Director in managing a capital asset project in DOE. The course is organized around the processes specified in DOE Order 413.3b and the associated Guides 413.3-1 through 413.3-19. This course is not a general overview of project management; therefore, it is highly recommended that participants take *Project Management Essentials* prior to taking this course.

Topics include:

- DOE's project management process in DOE Order 413.3b
- Roles and responsibilities of a Federal Project Director
- The Federal budget process
- NEPA and other environmental, safety and health laws

Course Format: Webinar format

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Project Risk Analysis and Management

This course is designed to introduce participants to the foundational aspects of identifying and managing risks during the life cycle of a project. Participants also acquire the skills that enable them to assign risk responsibility between Federal agencies 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.

Topics include:

- Identification and evaluation of risks
- Qualitative and quantitative risk assessments
- Risk management planning
- Monitoring risks
- Risk mitigation strategies

Course Format: 3-day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Requirements Analysis and Development

This course teaches participants how to uncover, analyze, write, verify, and test project requirements. The course takes a systems engineering approach to analyzing and developing project requirements.

Topics include:

- Characteristics of a sound project requirement
- Common sources of requirements
- Requirements analysis tools
- Document requirements
- Testable project requirements
- Requirements traceability matrix
- Project test and evaluation plan with requirements as the foundation

Course Format: 2-day instructor-led classroom delivery

Scope Management Baseline Development

This course is designed to enhance a Program or Project Manager's ability to define a project including identifying project requirements, examining alternatives, and developing the project scope baseline. The course emphasizes development of the Work Breakdown structure. The course also covers controlling project scope during project execution.

Topics include:

- Baseline development techniques
- Identifying risk and constraints for requirements
- Prioritizing requirements
- Trade-off analysis
- Iterative requirements management
- Scope change/configuration management

Course Format: 3-day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Strategic Planning

This course introduces participants to the skills needed to develop effective strategic plans for organizations, programs and projects, and presents 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.

Topics include:

- The strategic planning process
- Mission statement
- Vision statement
- Core values
- Situation analysis
- Strategies and outcome-related goals
- Performance measures and accountability and critical success factors
- Effective communication and trust

Course Format: 3-day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

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 and 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.

Topics include:

- Introduction to systems engineering
- Problem definition/mission need
- Validation of mission need
- Alternative evaluation and decision making
- Risk and opportunity management
- Systems engineering integration

Course Format: 3-day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Understanding Project Management and Preparing for the PMP® Exam

This course prepares 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. Our participants have a 99% success rate for passing this test the first time. Colleague Consulting, LLC is a Project Management Institute (PMI) Registered Global Education Provider (R.E.P.) authorized to issue Professional Development Unit (PDU) credits for PMI. This course meets PMI requirements for 35 hours of required project management training to sit for the PMP® exam.

Topics include:

- Project management framework and processes
- Integration management
- Scope management
- Time management
- Cost management
- Quality management
- Human resources management
- Communications management
- Risk management
- Procurement management
- Stakeholder management

Course Format: 5-day instructor-led classroom delivery

Value Management

This course provides participants with techniques for re-examining projects with a view to reducing total project costs. The course includes an overview of value engineering/value management (VE/VM) concepts, principles, and definitions, and focuses on the use of tools and techniques to improve project and program cost and schedule results, especially Return on Investment (ROI). This 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. The course applies current VE/VM practices that emphasize good communications and effective leadership.

Topics include:

- VE/VM concepts, principles, definitions, and legal/regulatory drivers
- Value management process
- 6-step value management job plan
- Team composition and leadership
- Communications

Course Format: 3-day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

FEDERAL FINANCIAL MANAGEMENT COURSES

Accounting Comes Alive™: Financial Literacy and Business Acumen

Accounting Comes Alive™ is a learning method that sharpens accounting and financial literacy to enable participants to better understand financial reports. This course treats accounting as a language instead of a technical, expert topic.

Topics include:

- Fundamentals of financial reporting
- Fund accounting and fund reporting (balance sheets, revenues & expenditures)
- How to read government-wide financial statements (net assets and activities)
- GAAP and the GASB34 model
- Budgetary and proprietary accounting
- The Standard General Ledger

Course Format: 2-day instructor-led classroom delivery

Elements of Finance for Senior Federal Officials

This course provides an overview of federal finance from a senior-level perspective for Federal leaders. This course provides guidance to Senior Executives on the limits of his or her authority and the risks of exceeding assigned authority. It covers the four phases of the Federal financial process.

Topics include:

- Budget formulation and execution
- Congressional action
- Reporting, performance measurement and audit

Course Format: 2-day Instructor-led classroom delivery

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 Federal government, and systematically provides the participants with an understanding of how Federal transactions are properly recorded in the accounting records.

Topics include:

- Standards, procedures and practices in federal accounting and financial management
- Budgetary and proprietary accounting transactions in the financial system
- Accrual accounting
- Federal balance sheets
- Closing
- External financial reports

Course Format: 4-day instructor-led classroom delivery

Federal Appropriations Law

This course covers the principles and practices of appropriations law in the Federal workplace. It is designed for personnel whose responsibilities include the certification, accounting, and disbursement of Federal funds, and program managers and budget officials who 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.

Topics include:

- Principles of Federal appropriate law
- Legal framework
- Availability of appropriations
- Allowable expenditures
- Duration of appropriations
- Limitations on appropriations, e.g., Anti-Deficiency Act

Course Format: 4-day instructor-led classroom delivery

Federal Budgeting Process

This course is designed to provide program and project managers a working knowledge of Federal financial and managerial systems to accomplish their Department's budgeting and accounting processes, including budget submissions, managing authorized funding, and establishing success criteria. Participants apply the foundational skills required to successfully manage a project through its financial life cycle. These skills include: integrating projects, programs, and missions; resourcing and funding programs; validating and funding projects; effectively participating in the budget process; managing the flow of funds to your programs and projects and; effectively using financial accounting and reporting systems to attain program and project success.

Topics include:

- Key budgeting concepts
- Appropriations structure
- "Color" of money
- Funds distribution and control processes
- Managing program and project execution to achieve mission success

Course Format: 2-day instructor-led classroom delivery

Federal Budgeting Process in Department of Energy

This course provides Department of Energy (DOE) program and project managers a working knowledge of Federal financial and managerial systems to accomplish their Department's budgeting and accounting processes, including budget submissions, managing authorized funding, and establishing success criteria. Participants apply the foundational skills required to successfully manage a project through its financial life cycle. These skills include: integrating projects, programs, and missions; resourcing and funding programs; validating and funding projects; effectively participating in the budget process; managing the flow of funds to your programs and projects and; effectively using

financial accounting and reporting systems to attain program and project success. The course also addresses the specific elements of DOE's budgeting process and financial management systems.

Topics include:

- DOE budgeting process
- DOE Strategic Management System
- DOE financial and business information systems
- Building the DOE program/project budget request
- Appropriations
- Funds distribution and control processes
- Managing program and project execution to achieve mission success
- Managing changes to Authorized Funding Program

Course Format: 4-day instructor led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Overview of Federal Accounting Principles

This course is an overview of key elements of Federal accounting and offers professionals who are non-accountants an introduction to the methodology and practice of Federal accounting. The course also explains how the United States maintains its financial records and reports financial results.

Topics include:

- Introduction to Federal accounting concepts, terms and principles
- US Government Standard General Ledger (USSGL)
- Federal accounting methods
- Financial reporting

Course Format: 1-day instructor-led classroom delivery

Successful Budget Justification and Presentation

This course provides participants with a fundamental understanding of the Federal budget process, and the roles and responsibilities and basic requirements of all participants involved in the process, including Federal agency budget analysts and program managers, Congress, and the President. The course provides information needed by Federal personnel to prepare, justify, and present budget requests to the OMB and Congress. It focuses on the preparation of materials, technical and financial analysis, presentation techniques, and working with OMB and congressional staff.

Topics include:

- Budget formulation
- Congressional action
- Budget execution
- Performance reporting, review and audit

Course Format: 2-day instructor-led classroom delivery

SUPERVISION AND LEADERSHIP DEVELOPMENT COURSES

Applied Human Resources Management for Supervisors

This 5-day course builds upon and expands the basic federal civilian human resources management concepts and information that participants already have gained from foundational classes on managing employees in the Federal government. Through individual and group exercises, case studies, role playing and discussion, supervisors understand their roles and responsibilities in managing human resources. Participants apply human resources management concepts to the challenges that they face in their day-to-day management of their employees. Course content, individual activities, and a final course exercise illustrate the linkage among the different human resources functional areas.

Topics include:

- Supervisor's role, responsibilities and expectations
- Position classification and pay
- Workforce planning and staffing
- Developing staff competencies and preparing Individual Development Plans
- EEO responsibilities
- Leveraging diversity
- Performance management
- Leave and attendance
- Discipline
- Handling grievances and appeals
- Working with unions

Course format: 5-day instructor-led classroom delivery

Building and Managing Effective Teams

Teams are often defined by reporting relationships or project assignment. Building and sustaining strong team performance, however, requires intention, planning, and collaboration. This course assists participants in defining, managing, and executing leadership responsibilities when they serve as Team or Project leads. Through experiential exercises and group practice, participants develop skills to build high-performing teams by discussing previous experiences, engaging in self-reflection around personal preferences, and evaluating current strategies. Participants use an assessment tool to examine their own approaches to projects and teams and are introduced to strategies for leading change initiatives.

Topics include:

- Different leadership styles and their impacts on team performance
- How and when to apply different management and leadership styles based on the attributes of the team members
- Effective communications and facilitation techniques to handle team challenges
- Motivation techniques

Course Format: 2-day instructor-led classroom delivery

Clear Communication Skills for Managers and Supervisors

Good communication skills are essential to be a successful manager. Yet, work is often hampered by ineffective or misleading information. Many managers do not even realize that their directions are unclear, insufficient, or easily misunderstood. This intensive workshop provides guidance on advanced-level communications skills specifically for those who manage and direct others. Participants are provided with concrete skill-building tools and learn strategies to enhance their oral and written communications. Participants will also identify their own preferred communication style for giving direction to others and the implications of these preferences.

Topics include:

- Overview of communications theories
- Positive and negative factor affecting effective communication
- Choosing the correct medium for effective communication
- Verbal and nonverbal communication
- Presentations and oral communication

Course Format: 2-day instructor-led classroom delivery

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 effectively, 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. This course is 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.

Topics include:

- Benefits of delegating
- Creating a team delegation plan, including the use of a multi-level delegation model
- Effective communications
- Methods for monitoring progress and taking corrective actions

Course Format: 1-day instructor-led classroom delivery

Developing Strengths-Based Leadership

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, are more engaged in their work, and are more productive. Each participant will complete the Gallup StrengthFinder® 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.

Topics include:

- Strength-based approach to leadership
- Research on effective leaders
- Domains of leadership strength
- Strategies for leveraging strengths

Course Format: 1-day instructor-led classroom delivery

Employee Motivation

Employee motivation is becoming ever more important in the workplace as time goes on, and everyone agrees that a motivated workforce is far more likely to be a successful workforce. The goal of a manager and leader is to create a working environment that delivers the right balance between a confident, motivated workforce and a workforce that is driven to attain goals. This course is designed to show participants the way to get the best out of a confident, motivated set of employees, and to show them how to motivate that group.

Topics include:

- Definition of motivation, and the roles of both the manager and the employee
- Importance of employee motivation to organizational success
- Techniques for promoting employee motivation
- Theories of employee motivation
- How personality types help determine the best plan for promoting motivation
- Importance of roles and defined goals for achieving a motivated workforce

Course Format: 1-day instructor-led classroom delivery

Engaging Leadership

Effective leaders understand what fosters and hinders employee engagement and motivation. Engagement, according to the Gallup organization, ranges along a continuum from full engagement to active undermining. Engagement in the same organization may vary along functional, departmental, generational and other lines. This course is a highly interactive, one-day session designed to help leaders deliberately develop a more engaging and motivating work environment.

Topics include:

- Range of employee engagement
- Workforce factors that foster and inhibit full engagement
- Employee motivation and employee engagement
- Workplace factors that foster and employee motivation
- Techniques for fostering a motivating work environment

Course Format: 1-day instructor-led classroom delivery

Everyone is a Leader: How to Demonstrate Leadership Attributes from Wherever You Are

In this course, participants explore how to apply leadership principles to their current role, regardless of their job title or job level. 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. The course also examines interpersonal topics such as managing conflict, understanding emotional intelligence, and respecting diversity. Participants take a strength-based leadership assessment and discuss how to leverage their own strengths as well as their team's strengths. Participants leave the course with a personalized leadership skills development plan.

Topics include:

- Characteristics of effective leadership and followership
- Situational leadership theory
- Effective communications
- Conflict resolution styles
- Emotional intelligence
- Diversity and inclusion

Course Format: 2-day instructor-led classroom delivery

Executive Communications

This course is designed to provide 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. Two executive communication coaches offer key techniques through interactive modules and video practice to help participants deliver successful presentations, media interviews, and congressional testimony or briefings. Participants are encouraged to share their experiences as senior-level managers who have been involved in the project management process.

Topics include:

- Core concepts in communication
- Communicating the message
- Delivery techniques
- Active listening
- Language of leadership
- Interview techniques
- Core concepts in risk and crisis communication

Course Length: 3-day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Facilitating Conflict Resolution

This course covers a variety of topics specific to resolving conflicts in the workplace. 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; and minimizing or resolving conflict in groups and between employees using appropriate interpersonal strategies. Participants take the Thomas-Kilmann® conflict mode assessment instrument (TKI) to reveal their preferred style of managing conflict and learn the advantages and disadvantages of different styles. The course includes a significant emphasis on the use of facilitation techniques within the conflict resolution process.

Topics include:

- TKI conflict styles and uses of each
- Ladder of Inference
- Direct and indirect communication style
- Facilitation techniques

Course Format: 3-day instructor-led classroom delivery or webinar format

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Introduction to Navigating the Federal Hiring Process

This course provides new supervisors with an overview of the Federal hiring process including the role and responsibilities supervisors have in the hiring process and tips for most effectively partnering with human resources specialists to hire the best candidates. Participants learn about the types of planning activities that they need to conduct to ensure effective recruitment actions, and the specific information that they need to provide to their human resources partners. They are introduced to the range of options that are available to hire new employees, including special hiring authorities.

Topics include:

- The specific laws, regulations, and policies that apply to Federal hiring processes
- How to create a position description
- The steps in conducting a job analysis which serves as a fundamental source of information required throughout the hiring process.

Together with *Supervisory Essentials: Strategies for Success*, these two courses satisfy the OPM 40-hour mandatory requirement for new supervisors.

Topics include:

Course Format: 1-day instructor-led classroom delivery

Is Supervision or Management for You? – A Supervisor's Job Preview

This course introduces participants to the roles and responsibilities of a supervisor or entry-level manager to help them determine if supervision is an appropriate career path. Participants examine what makes a good supervisor/manager, some common myths about the position, key challenges to being an effective supervisor/manager, and a description of the explicit roles and responsibilities.

Discussions as well as group and individual exercises throughout the day reinforce learning and help participants in the decision to pursue a supervisory role.

Topics include:

- Supervisor/entry level manager roles and responsibilities
- Supervisor/manager vs. leader
- Knowledge, skills and characteristics required of a supervisor/manager
- Benefits and challenges of being a supervisor/manager
- How to evaluate the decision to pursue a supervisory/manager career

Course Format: 1-day instructor-led classroom delivery

Knowledge Management

Organizations have a wealth of knowledge accessible through the people they touch internally, like employees, and externally, like stakeholders. An organization that is able to capture, store, and retrieve knowledge effectively is one where employees are empowered to change and develop new methods, thoughts, and strategies that will advance the mission of their organization. Knowledge management is the establishment of a system that captures knowledge purposefully for incorporating into strategies, policies, and practices at all levels of the organization. This course will teach the participants how to initiate a knowledge management program at work. When it comes to knowledge management, any organization is able to implement a strategy that will help achieve its performance goals.

Topics include:

- Basic concepts of knowledge management (KM)
- Do's and don'ts of KM
- KM life cycle
- KM models and best practices
- Implementation of a KM system

Course Format: 1-day instructor-led classroom delivery

Labor Management Relations

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

Topics include:

- Roles and responsibilities in labor management relations
- Basic rights
- Communicating with employees and union officials
- Making changes
- Negotiations
- Unfair labor practices

- Contract administration
- Handling grievances

Course Format: 3-day instructor-led classroom delivery

Leadership Skills for Non-Supervisors

Federal employees who aspire to become managers and supervisors in the future may not have received 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 gain the skills they will need for effective decision making, communication, delegation, and leadership behaviors.

Topics include:

- Skills, techniques and behaviors of being a good leader
- Leading by example
- Making faster, smarter decisions
- Effective communications
- Delegating

Course Format: 2-day instructor-led classroom delivery

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, and techniques for managing conflict, giving and receiving feedback, and decision-making. The course provides a practical and effective toolkit for communicating in a project-focused environment, and a resource list for continuous learning.

Topics include:

- Communication styles and their uses and impacts
- Giving and receiving feedback
- Consensus-building techniques to build alignment toward project goals
- Leadership techniques
- Managing conflict

Course Format: 3-day instructor-led classroom delivery

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Leading by Coaching: Developing and Enhancing Performance Through Coaching Techniques

Leaders use coaching conversations to motivate and support employees to achieve their full potential. In this experiential workshop, participants learn how to apply techniques used by professional coaches to develop and practice the skills required to successfully coach others. Participants will review best practices to productively resolve conflicts, explore techniques to effectively coach across a geographical distance, and develop coaching plans for each of their employees to motivate and engage them to reach their full potential. Participants gain tools and skills to engage in productive conversations in a variety of work settings, even when those conversations might be difficult.

Topics include:

- Techniques to use during performance appraisals to foster measurable improvement
- Tips for continuous dialogue about progress and performance and addressing the root causes of performance issues
- Critical behaviors that transform performance
- Ownership of, and accountability for, career development plans

Course Format: 2-day Instructor-led classroom delivery

Managing Change and Transition

The speed of research and development, information sharing, and knowledge management requires that organizations keep in constant motion, changing processes and people almost incessantly. 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 and building the business case
- Planning the transition and developing the action plan
- Implementing and monitoring transition activities
- Assessing the success of change and transition

The majority of the class time is spent in discussion, reflection, hands-on, and action-learning activities to help leaders envision, market, and implement changes and assume ownership and implement changes designed by others.

Course Format: 3-day instructor-led classroom delivery

Managing Virtual Teams

In today's work environment, team members often work in different locations either because of different duty stations or because they are taking advantage of workforce flexibilities such as telecommuting and alternative work schedules. This course, based on leading research findings, is designed to provide supervisors with skills and techniques for leading and managing teams in this new virtual operating environment. Participants discuss key challenges to leading and managing virtual teams, including communications, networking, technology, and management challenges, and examine their own personal biases and underlying concerns. This course is highly interactive with group work and discussions, and includes exercises designed to simulate the virtual workplace.

Topics include:

- Setting clear expectations and managing remote staff effectively
- Collaborating in a virtual environment
- Communicating effectively with supervisors, employees, and customers

Course Format: 1 or 2-day instructor-led classroom delivery or webinar format

Managing Yourself and Your Team

This class helps leaders to identify and model key characteristics of effective leadership to support innovation and change and maximize team performance. Through discussions and exercises, participants gain increased self-awareness and learn how to build collaborative and motivated teams. Participants also develop follow-through personal development plans to productively apply skills and strategies acquired in the training.

Topics include:

- Characteristics of an effective leader
- Emotional intelligence
- Collaboration communication
- Motivation
- Characteristics of high functioning teams

Course Format: 3-day instructor led classroom delivery

Negotiation Strategies and Techniques

In this course, participants learn about negotiation strategy and planning, identifying key stakeholder interests in negotiations, determining best alternatives to negotiated agreements, and effectively communicating during negotiations. Through reading assignments from Harvard Law School's prestigious Program on Negotiation and mini case studies, participants are introduced to methods to improve their performance in negotiating agreements. Participants then practice using learned strategies during the course.

Topics included:

- Interest-based vs. position-based negotiation strategies
- Best Alternative to a Negotiated Agreement (BATNA) process

- Role and importance of power in negotiations
- Role and importance of communication in negotiations
- Management of information exchange during negotiations

Course Format: 3-day instructor-led classroom delivery or webinar format

Note: This is an approved course in the Department of Energy's Project Management Career Development Program curriculum.

Performance Management Check-In for Senior Managers and Executives

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. This course, employing best practices, 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.

Topics include:

- Setting the standards for performance management
- Identifying the attributes of effective performance planning
- Providing effective feedback
- Describing and modeling the behaviors in an organization

Course Format: 1-day instructor-led classroom delivery

Performance Management for Supervisors

Supervisors play a challenging and pivotal role in organizations—not only do they manage the day-to-day work of their team, but they also manage their team members' performance and success. Effective supervisors use performance management best practices to meet the needs of their organization and support the growth of individual employees. 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. Participants will have opportunities to practice these skills through discussions, role-play activities, self-assessments, and case studies.

Topics include:

- Performance Management Fundamentals
- SMART goal setting
- Monitoring performance
- Diagnosing performance issues
- Providing feedback
- Motivating employees

Course Format: 1-day instructor-led classroom delivery

Successful Mentoring Skills

Successful mentoring programs encourage relationships that support the learning and development of employees and 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 in order to produce rapid improvement and lasting results.

Topics include:

- Techniques for creating an effective mentor/protégé relationship
- Roles and expectations of mentors and protégés within your mentoring program
- Communications skills to motivate your protégé
- Evaluation of skills to determine protégé strengths and potential areas for development
- Delivering feedback

Course Format: 2-day instructor-led classroom delivery

Supervisory Essentials: Strategies for Success

This course is designed to assist new first-line supervisors develop the competencies they need to achieve their primary responsibilities of meeting 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 helps participants acquire skills that enable them to develop strategies for addressing the challenges of making the transition from employee to supervisor/manager. Participants examine leadership practices; practice the stages of team development; and identify ways for building trust and cooperation on teams.

Topics include:

- Supervisory role and responsibilities
- Communications and feedback
- Performance management
- Conduct issues
- Leave and attendance policy
- Motivation and performance
- Labor management
- Conflict resolution
- Diversity and inclusion

Course Format: 4-day instructor-led classroom delivery

Techniques for Managing the Multi-Generational Mix

This course sets the foundation for a clearer understanding of the characteristics of the generational groups in the workplace and how managers can take advantage of their differences to improve organizational performance. Through discussion and exercises, 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.

Topics include:

- Recognizing and appreciating the benefits of generational diversity
- Effective communications
- Techniques to leverage generational diversity

Course Format: 2-day instructor-led classroom delivery

Trustworthy Customer Service®

In this highly 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 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.

Topics include:

- Defining customer service
- Establishing relationships
- Building and maintaining customer relationships
- Negotiations
- Conflict resolution

Course Format: 2-day instructor-led classroom delivery

Understanding, Recognizing and Valuing Diversity and Inclusion

Diverse and inclusive workplaces are more innovative, efficient, productive, and successful. This 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. Specific emphasis is given to cultivating a deeper and more profound appreciation for individual and group differences to help them recognize, value, and manage diversity in the workplace. Participants engage in self-reflection and discussions to better understand how diversity and inclusion affect the workplace, determine strategies for contributing to an inclusive work culture that leverages different dimensions of diversity, and identify ways to create inclusive work relationships.

Topics include:

- How diversity and inclusion leads to improved team and organizational performance
- Stereotypes vs. biases
- Impact of culture in the workplace
- Impacts of mental models and personal biases in the workplace
- Breaking down the barriers
- Strategies for building and fostering an Inclusive workplace

Course Format: 1-day instructor-led classroom delivery

Using Consulting Skills to Improve Individual and Organizational Performance

Many Federal organizations provide their respective agencies support services such as training, HR, project management, financial management, IT, security, legal counsel, communications and outreach, and others. This course provides participants with the skills needed to enable them to think and act like a consultant in order to improve their individual and organizational performance. Participants learn the basic principles of a successful consultant and discuss the value they can bring to their organization through this role. Participants learn the components of the consulting process and gain practical consulting tools and approaches that they can apply to their job functions. The course is highly interactive and includes a self-assessment, business problem solving techniques, and exercises to allow them to practice applying these techniques to actual issues they are facing.

Topics include:

- The five phases of the consulting process
- Techniques to identify client needs
- Contracting to accomplish the work
- Planning work using project management principles and techniques
- Consulting tools to perform the work
- Customer relationships and resolving customer relations issues
- Project closeout and follow-on assignments

Course Format: 3-day instructor-led classroom delivery

Writing Performance Objectives

In this course, participants are given the opportunity to write performance objectives or performance standards based on their 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 S.M.A.R.T goals model, communicating expectations to employees, and holding themselves and employees accountable.

Topics include:

- Phases of performance management process
- Goal-setting
- Critical elements
- SMART model
- Ratings process
- Feedback and communication
- Rewards and recognition

Course Format: 2-day instructor-led classroom delivery

CAREER DEVELOPMENT COURSES

Collaborating and Knowledge Sharing

This course helps participants to build collaborative knowledge-sharing practices within their organization—from a communication and leadership perspective rather than from a technological perspective. Throughout the course, participants have opportunities to network, share, and receive feedback on current practices, and participants are highly encouraged to share and test out their ideas. Participants discuss the types and uses of collaboration, how to overcome obstacles and capitalize on collaboration opportunities, and how to foster a collaborative culture. They also develop a collaboration plan for their organization.

Topics include:

- Benefits of creating a collaborative and knowledge-sharing organization
- Obstacles to collaboration
- Tips and techniques for fostering a collaborative environment
- Developing an organization plan for creating a collaborative and knowledge sharing organization

Course Format: 3-day instructor-led classroom delivery

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 role-playing, 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.

Topics include:

- How communications affect workplace performance
- Differences in communication styles
- How to increase your awareness of the impact cultural differences have on verbal and non-verbal communication in the workplace
- Techniques and strategies for safe and respectful interpersonal communication

Course Format: 2-day instructor-led classroom delivery

Creative Problem Solving

This course consists of highly interactive learning focused on real-world problem solving. Active learning takes place through simulations that connect content to participants' world of work. This course is customized to meet the unique challenges of the participants.

Topics include:

- Methods to overcome mental blocks to creative problem-solving
- Methods to create a safe environment for questioning assumptions and encouraging feedback
- How to apply systems thinking to solve problems
- Methods for building consensus and alignment

Course Format: 2-day instructor-led classroom delivery

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. 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.

Topics include:

- Impacts of mental models on critical thinking
- Three risk analysis models for measuring risk and impact on performance
- Applying systems thinking to resolve organizational challenges
- Methods to build consensus and alignment
- Effective communications tips and techniques

Course Format: 2-day instructor-led classroom delivery

Effective Business Writing

Based on the Executive secretariat Style Guide, the Federal Acquisition Regulation, and the Plain Language Initiative, this highly interactive and exercise-based course is designed to help Federal employees write more efficiently and effectively. Participants learn the steps of the writing process to improve the impact of their business correspondence, including emails, project summary reports, solicitations, resumes and other documents that support business decisions, budget requests, and personal careers. Participants also learn the three key steps for ensuring exceptional quality through revision, editing and proofreading.

Topics include:

- Basics of plain language
- Project-related writing
- Writing for contracts and acquisition
- Tailoring writing to target audience
- Business letter
- Communicating using Powerpoint and email

Course Format: 2-day instructor-led classroom delivery

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 interpersonal relationships and decision making, and learn ways to improve their interpersonal relationship, become a better listener and leader and increase confidence and self-esteem. 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.

Topics include:

- The four domains of emotional intelligence
- How to employ your EQ to facilitate better decision-making
- How to use your EQ to create a conducive work climate for high productivity
- Motivation techniques using emotional intelligence

Course Format: 2-day instructor-led classroom delivery

Ethics and Decision-making

Ethics policies and procedures apply to all employees, so everyone needs to be conversant with the applicable regulations. 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. The course is tailored to each organization and its own unique provisions, and includes resources for help with these issues.

Topics include:

- Ethics and conflicts of interest including statutory and regulatory requirements
- Rights and responsibilities under ethics and conflicts of interest rules, including conduct and reporting obligations
- Ethics and the decision-making process

Course Format: 2-day instructor-led classroom delivery

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. The course presents techniques for focusing discussions and building consensus, facilitating brainstorming sessions, and running focus groups.

Topics include:

- Methods for creating meeting agendas
- Facilitation techniques to manage group decision-making
- Facilitation techniques to streamline and enhance group discussions

- Tips and techniques to facilitating meetings

Course Format: 2-day instructor-led classroom delivery

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.

Topics include:

- Key important components of meeting management
- How to run a results-oriented meeting
- How to use an agenda to keep the meeting on time and on track
- Questions to ask to generate productive discussions in meetings
- Effectively managing discussions

Course Format: 2-day instructor-led classroom delivery

Persuasive Legal Writing and Reasoning

This writing course has been designed specifically for attorneys, paralegal staff, and legal resource analysts who wish to accelerate their writing and improve its effectiveness. The writing method used in this course was developed from 15 years of research and experience working with Federal agencies, successful professional firms, Fortune 500 companies and bar associations. 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.

Topics include:

- Process for defining key issues, developing a working theory, and applying the theory to the research and writing
- Techniques for grouping, sequencing, and connecting ideas for clear, convincing legal writing
- Visual writing model
- Formatting

Course Format: 2-day instructor-led classroom delivery

Presentation Skills – More Than Just Public Speaking

Verbal skills sometimes thought of as 'platform' skills play a key role in how leaders, managers and technical experts are able to communicate effectively. This course helps participants learn how to effectively design, develop, and deliver high-impact presentations that convey complex ideas and concepts in language and terms that are understandable by people who come from diverse

backgrounds. This course allows participants at all career levels to practice their presentation skills and receive instructor and peer feedback for improving their effectiveness. As part of the course, participants will be in groups and each person will design and deliver a five-minute presentation. All participants are videotaped, critiqued and then given the opportunity to perform their presentation again. Each participant gets a copy of the videotape to take home.

Topics include:

- Characteristics of effective presentations and successful presenters
- Different communication styles, techniques and tools and how to use them effectively
- Strategies for engaging audiences and adapting to the needs of the audience
- Strategies for dealing with a disruptive audience
- Strategies for avoiding the most common presentation mistakes

Course Format: 2-day instructor-led classroom delivery

Retirement Seminars (CSRS/FERS)

Colleague's retirement courses are designed to stimulate positive thinking toward proper planning for post-retirement years for federal employees covered by the CSRS/FERS retirement program. Each course emphasizes advanced pre-retirement planning, including goal setting, planning non-financial aspects of retirement, and managing time and interests. The seminars also cover CSRS/FERS benefits, estate planning, financial planning, tax and legal issues, health considerations, social security benefits and Medicare, life after retirement, health benefits, life insurance, and the Thrift Savings Plan.

Colleague offers a full range of pre-retirement seminars for employees in different federal retirement systems, and at different stages of their careers. The length of the seminars can vary, based on the amount of information and the level of detail desired by the agency. Options are available for agencies that need to combine CSRS and FERS employees in a pre-retirement seminar. Combining CSRS and FERS can benefit a small number of employees and reduce the costs of the retirement training.

Topics covered:

- Pre-retirement planning
- Financial and estate planning
- CSRS or FERS benefits
- Social security benefits and Medicare
- Thrift Savings Plan

Course format: Instructor-led classroom delivery (options are shown below).

- Two to three-day FERS or CSRS Pre-Retirement Seminars
- Two to three-day combined FERS and CSRS Pre-retirement Seminars
- One-day FERS or CSRS Pre-retirement Seminars
- One or two-day Mid-Career Retirement and Financial Planning Seminars
- One or one-half day New Employee Retirement and Financial Planning Seminars
- One-half day Thrift Savings Plan Seminars

Understanding Benchmarking

Benchmarking provides a comparative analysis of an organization's activities to "Best Practices" in world class organizations. This course is designed for Federal managers and includes discussions and exercises applicable to Federal organizations. This program covers the fundamentals of benchmarking practice, including the Five W's – who, what, when, where and why, and the how-to.

Topics include:

- The terminology, techniques, and approaches to conducting benchmarking
- How to make improvements against the benchmarks you target
- Resources available to support benchmarking
- A-76 studies

Course Format: 2-day instructor-led classroom delivery