



COLLEAGUE
CONSULTING

Partners in
Performance



TRAINING CATALOG

2024



Meet Colleague Consulting

Your Partners in Performance



Established in 1997 by Dr. Michael Cook, a distinguished social psychologist with expertise in adult learning, Colleague Consulting offers tailored training solutions designed to empower employees, managers and leaders to thrive within the dynamic landscape of the modern workplace. We also design insightful human capital management, leadership development, and coaching approaches that increase organizational performance and competence. Truly “colleagues” to all our partners, our mission is maximizing our clients’ success.

Colleague is proud to be a Authorized Training Partner with the Project Management Institute (PMI) and is certified to provide nearly 50 project management courses for PMI continuing education credit. We are also certified to provide National Association of State Boards of Accountancy (NASBA) Continuing Professional Education (CPE) credits.

Please visit us at
colleagueconsulting.com



Colleague's Training Makes a Measurable Difference

Colleague's expert instructors deliver over 100 courses on:

- **Leadership**
- **Management and supervision**
- **Diversity, equity, inclusion, and accessibility (DEIA)**
- **Grants management**
- **Project and program management**
- **Acquisition and contract management**
- **Professional and interpersonal skills**

One of today's biggest challenges is attracting, developing, and retaining talented leaders and high-performing employees who will excel in your business environment. Colleague's competency-based courses are designed to meet the specific needs of your workforce to help you become more results-focused, resilient, inclusive, open to diverse work styles, and more capable of leading and sustaining your organization's mission.

We also design and deliver customized training programs that take a curriculum perspective—integrating content across courses to reduce redundancy. We offer a mix of delivery options—including traditional classroom training and virtual webinar-based courses—to meet your preferences, scheduling and geographic needs. Our highly skilled instructors develop and deliver customized and off-the-shelf courseware at your site or at a location (or virtual platform) of your choice.

“*My coaching experience was superior – life-changing, as a matter of fact. My coach provided me with the tools and the insight that changed my thinking about the possibility of being a leader within my agency.*”

– **Internal Revenue Service**

Advantages of Partnering with Colleague

- Our courses are highly experiential, and we partner with you to customize content to meet the specific needs of your workforce.
- Our course design integrates practical strategies, tools, real-life applications, and proven best practices that can be directly applied to the workplace.
- All courses can be delivered in a classroom, virtually via a number of online technology platforms, or in a hybrid or blended learning format.
- Our instructors are all subject matter experts with decades of federal government and private sector experience, so they are intimately familiar with the types of challenges your workforce faces.
- Our instructors are highly rated—our average participant evaluation score for instructor knowledge and experience is 4.8 on a 5-point scale. Our instructors also scored 4.5 out of 5.0 on a measure asking if participants' knowledge and skills increased as a result of taking the course, a primary metric for measuring success.



How to Order Training

Federal government customers can order courses from Colleague Consulting via several contracting/purchasing options:

Government Purchase Order using a [Standard Form 182 \(SF-182\)](#) or other standard training order

Colleague Consulting's **GSA Multiple Award Schedule (MAS)** contract # GS-02F-0048V

Colleague Consulting's **GSA Human Capital and Training Solutions (HCaTS)** contracts:

- Pool 1 Training Small Business Contract # GS02Q17DCR0010
- Pool 1 Training Unrestricted Contract # GS02Q16DCR0116

Pricing

The course price includes participant materials, post-course evaluations, and course completion certificates for a maximum of 30 participants per session. Additional expenses, including travel, assessments, and supplementary materials, may result in extra charges. You can find information on Colleague's federal contracts and sample course pricing on [our website](#).

Customized Training for Your Organization

If the topics you're looking for are not currently covered in our training catalog, we are happy to collaborate with you and your in-house experts to customize any of our offerings to meet your organization's specific needs, or even develop courses from scratch. Our knowledgeable instructional designers are adept at adapting our courses to suit virtual training, e-learning, or blended learning environments while incorporating your workplace-specific subject matter.

To inquire about our training services or to discuss contracting with Colleague Consulting, please contact our Training Program Manager, **Ms. Elizabeth Cusin**, at ecusin@colleagueconsulting.com or **301-277-0255 EXT. 104**.



Course Formats



Classroom Instructor-Led Training (ILT)

Participants engage in face-to-face learning within a traditional classroom environment, guided by our expert trainers. We deliver top-notch facilitators to your location for on-site employee training. Our instructors employ breakout sessions and interactive activities to enhance learning and improve knowledge retention.



Virtual Instructor-Led Training (VILT)

Participate in virtual classroom sessions from the comfort of your remote location, connecting via live video and audio streams. You'll have the opportunity to interact with both fellow participants and the instructor through chat and various interactive tools. Our online course platforms include Zoom/ZoomGov, WebEx, Adobe Connect, and Microsoft Teams.



Hybrid Training

Hybrid deliveries prioritize learner-centric experiences by accommodating different preferences. Some prefer the quiet of remote learning, while others enjoy in-person interactions during breaks. This approach adapts to where participants learn best whether in a physical classroom or virtually. Our instructors and hybrid producers are trained to engage both audiences simultaneously, creating a dynamic learning environment.



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LEADERSHIP COURSES



21ST CENTURY LEADERSHIP SKILLS

This course equips participants with the necessary skills to thrive in today's rapidly changing and competitive workplace. Focusing on innovation, self-management, and leadership at all organizational levels, it offers a fresh perspective on unleashing employee potential and adapting to evolving work dynamics. By enhancing awareness and imparting practical tools, the course aims to empower individuals to initiate and lead effectively in an environment that demands independence and adaptability.

Topics:

- Basics of adult development theory
- Unique challenges posed in leading organizations, especially in adaptive versus technical contexts
- Importance of becoming emotionally intelligent and how it is essential to growth and performance
- Articulating your purpose and core values
- Identifying behaviors that contribute to building trust
- Creating conversations that build a culture of performance

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

24/7 COACHING®: LEADING BY COACHING, DEVELOPING, AND ENHANCING PERFORMANCE

Many studies have shown that individuals who receive coaching benefit from improved work performance, relationships and more effective communication skills, as well as overall increased productivity. This course teaches supervisors, managers, and executives how to use coaching skills in their day-to-day interactions and management of performance duties with their direct reports. It is intended to build supervision skills such as interpersonal communication, performance management, developing others, and accountability. This course focuses on imparting essential skills for 24/7 Coaching, encompassing the ability to recognize opportune coaching moments, skillfully pose coaching questions, engage in empathetic listening, deliver immediate feedback, collaboratively design actionable steps, inspire through personal example, and consistently uphold a coaching-oriented mindset. Note: This course is not for accredited coach certification.

Topics:

- Beginning to develop and enhance your own personal coaching skills
- Utilizing coaching skills to help develop your direct reports
- Assisting direct reports to grow in responsibility and accountability
- Supporting the transition of employees to new, higher levels of leadership
- Assisting in the retention of talented, motivated staff

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



ADVANCED LEADERSHIP SKILLS FOR TODAY'S MANAGERS AND SUPERVISORS

Federal managers and supervisors are faced with demands that lie outside the traditional scope of supervision: increasing diversity in the workforce; changing values among different generations of employees; the loss of large numbers of senior, experienced staff; and changing philosophy regarding mission and scope. Many agencies are embracing a model that has parallels in the private sector and are redefining themselves within a business model. In this evolving environment, the ability to be forward-looking and innovative is critical. This highly interactive course provides practical skills and techniques that apply to your workplace.

Topics:

- Assessing your leadership style to build on your strengths and grow your team
- Advanced leadership skills including facilitating change, strategic thinking, enhancing motivation, and fostering creativity
- Different perspectives on combining leadership and management
- Communication techniques that will facilitate clarity and energize your employees
- The importance of creating alignment and effective techniques to accomplish it
- Tips for using feedback and disclosure as techniques to increase trust
- Using iteration as a process of continual improvement

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

BECOMING AN INSPIRATIONAL LEADER

This comprehensive training course offers an opportunity for participants to delve deeper into the realm of inspirational leadership, focusing on fostering a culture of motivation and excellence within an organization. Through this course, attendees will acquire a diverse range of skills essential for effective leadership and the art of inspiring their teams to consistently deliver their utmost performance. The program not only equips participants with practical tools for leading but also empowers them to create a positive and lasting impact on their teams and the organization as a whole.

Topics:

- Overview of inspirational leadership theory
- Identify leadership traits to develop
- Develop a draft plan for becoming a (more) inspirational leader
- Instill passion, dedication, and commitment in teams

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



CHANGE MANAGEMENT FOR LEADERS

For current and emerging leaders who initiate change and collaboration with those they lead, this course addresses a variety of organizational changes and examines the roles and psychological aspects of transitioning through change. You will learn how to assess change readiness and organize change efforts, taking into account the human dimensions of transition and trust in meaningful change. You will examine the role of perceptions, assumptions, resistance, beliefs, and values crucial to change initiatives. The goal is to expand awareness, strengthen skills and integrate into your experience useful concepts and practical tools so that you can initiate and lead a successful change effort for results.

Topics:

- Applying theoretical frameworks and practical tools on how to lead change, create a vision and climate for sustainable change and growth
- Exploring the role of leadership during change and transition efforts
- Reflecting on your own leadership style and relationship to change
- Appreciating the foundational role of trust and transparency in any change effort
- Leveraging the strengths of your team members to increase collaboration and team effectiveness during change

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

COLLABORATIVE LEADERSHIP SKILLS: AN INTRODUCTION

In collaborative work settings, managers go beyond project oversight and goal achievement; they actively engage with employees and collaborate across teams and departments to achieve common objectives. This course is designed for new supervisors and managers, offering insights into various leadership styles and specifically emphasizing the distinction between collaborative leadership and other leadership approaches. Participants will learn when to effectively employ collaborative leadership, identify barriers to its implementation, and acquire techniques to overcome these obstacles.

Topics:

- Why is collaborative leadership important?
- What is collaborative leadership?
- The skills necessary for collaborative leadership
- Overcoming barriers for collaborative leadership
- Plan of action: developing your skills as a collaborative leader

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



COLLABORATIVE LEADERSHIP SKILLS FOR MANAGERS

Managers are bombarded with an almost constant stream of data every day. This overload of data makes knowledge management increasingly more important to enable managers to efficiently facilitate decision making, create nimble learning organizations, and facilitate innovation and change. This in-depth course helps experienced managers build collaborative knowledge-sharing practices within their organization—from a communication and leadership perspective rather than from a technological perspective. Throughout the course, you will have opportunities to network, share, and receive feedback on current practices, and you are highly encouraged to share and test out your ideas. The course discusses the types and uses of collaboration, how to overcome obstacles and capitalize on collaboration opportunities, and how to foster a collaborative culture.

Topics:

- 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 Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

DEVELOPING AND ENHANCING PERFORMANCE THROUGH COACHING TECHNIQUES

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

Topics:

- 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 Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



DEVELOPING STRENGTHS-BASED LEADERSHIP

Extensive research conducted by Gallup over 50 years showed that people who work from their strengths are happier, are more engaged in their work, and are more productive. This workshop is based on the findings of that research. In this interactive workshop, you identify your own talents and develop strategies to leverage team talents. Each participant completes the Gallup CliftonStrengths Assessment (formerly StrengthsFinder®) prior to the workshop. During the workshop, you develop individual and team action plans and prepare to apply your strength-based leadership skills in your day-to-day working environment. This facilitated workshop may also be used as a teambuilding opportunity with intact teams.

Topics:

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

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

ENGAGEMENT AND ACCOUNTABILITY IN THE VIRTUAL WORLD

In any leadership context, whether conducted in-person or virtually, engagement and accountability are fundamental for all involved parties. While these elements can present challenges in face-to-face scenarios, the virtual environment offers an ideal platform to seamlessly incorporate them. This course is designed to assist participants in leveraging the benefits of virtual connectivity while discarding preconceived notions from in-person interactions. It tackles prevalent issues surrounding engagement and accountability, offering a fresh perspective on adapting to the new reality.

Topics:

- Identifying and discarding thinking habits that stand in the way of seeing the advantages to virtual connection
- Engaging in creating new 'rules of engagement' that encourage candor, shared responsibility, and pushing forward rather than pushing back
- Building a community of learning that captures and builds on continuously expanding facility in virtual leadership at every level

Course Length:
1/2 day

Course Format:
Classroom ILT
Virtual ILT



ENGAGING TRANSFORMATIONAL LEADERSHIP

Discover the power of Engaging Transformational Leadership in this concise 2-hour workshop. Proven to boost staff motivation and job satisfaction, this model fosters an environment of commitment, well-being, and personal growth. Learn key principles including effective communication, idea-sharing, and respect for diverse perspectives, both within teams and externally. Embrace a culture that embraces innovation, encourages challenging norms, and treats mistakes as opportunities for learning.

Topics:

- Develop the skills effective leaders use to engage their team members
- Promote a workplace environment that supports adaptability, innovation, and growth
- Engage interactive discussions and exercises to identify factors that generate engagement and disengagement
- Tools to cultivate workplace relationships
- How to hold conversations that sustain engagement during times of change and conflict

Course Length:
2 hours

Course Format:
Classroom ILT
Virtual ILT

ETHICAL DECISION-MAKING

Public policy often requires redistributing resources, denial of rights or privileges, or promoting one group over another. In this course, you will learn about the role ethical principles play in how we formulate and implement public policy and how to use decision-making frameworks to help balance competing interests to make the best decision or the one that causes the least amount of harm.

Topics:

- Understanding the role of ethics in decision-making and how it relates to public policy
- Real-world ethical dilemmas, using frameworks and considering choices to select a “best” option
- Ethical risk assessments in decision making
- Evaluating, testing, and strengthening one’s personal decision-making processes

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



EVERYONE IS A LEADER: HOW TO DEMONSTRATE LEADERSHIP ATTRIBUTES FROM ANY LEVEL

In this course, participants explore how to apply leadership principles to their current role, regardless of job title or rank. We equip you with the tools to apply leadership principles effectively within your current role. Throughout the course, we challenge your thinking and encourage a shift in your approach, empowering you to excel as a manager, influencer, relationship-builder, persuader, delegator, and trusted advisor capable of driving both people and agendas forward. Additionally, we explore crucial interpersonal skills, including conflict management, emotional intelligence, and fostering diversity awareness. You will engage in discussions on harnessing not only your own strengths but also those of your team to achieve collective success.

Topics:

- Characteristics of effective leadership and followership
- Situational leadership theory
- Techniques for collaborating with key stakeholders
- Strategies for working effectively in teams
- Effective communications
- Conflict resolution styles
- Emotional intelligence
- Diversity and inclusion
- Critical thinking and problem-solving techniques
- Techniques to influence and persuade
- Strategies for leading through organizational change and/or conflict

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

INTERPERSONAL SKILLS FOR LEADERS

Effective leadership hinges on a person's interpersonal skills and their ability to connect with others. Regardless of their expertise in a given field, a leader's success greatly depends on their capacity to interact harmoniously with those they work alongside, especially their team members. This course is designed to empower leaders by fostering an understanding of the intricate nature of communication and by encouraging self-assessment of their listening skills to identify areas for growth. Throughout this program, participants will delve into techniques for strengthening relationship-building capabilities, critically evaluate their personal communication competencies in the workplace, and learn how to respond appropriately to others.

Topics:

- Understand the "why" of interpersonal skills
- The complexity of communication
- Explore the Interpersonal Skills found in great leaders

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



LEADERSHIP SKILLS FOR NON-SUPERVISORS

Federal employees who aspire to become managers and supervisors 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:

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

LEADERSHIP THROUGH EFFECTIVE COMMUNICATION

Research has shown that the best leaders demonstrate strong communication skills in managing their staff and projects, detailing strategy, and communicating with internal and external stakeholders. This highly interactive session focuses 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, techniques for managing conflict, giving and receiving feedback, and decision-making. The course also provides practical and effective tools for communicating in a project-focused environment, and a resource list for continuous learning.

Topics:

- 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 Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

Course Length:
3 days

Course Format:
Classroom ILT
Virtual ILT



LEADING EFFECTIVE TEAMS

Teams are often defined by reporting relationships or by the projects to which they are assigned. Creating a team, however, does not in itself guarantee that the desired objectives will be achieved. Building and sustaining strong team performance requires intention, planning, and collaboration. Empower yourself as a team or project leader through this course, honing your ability to define, manage, and excel in leadership roles. With immersive exercises and collaborative practice, cultivate the skills to construct high-achieving teams by analyzing past encounters, reflecting on individual inclinations, and assessing current methodologies. Leverage assessment tools to evaluate your project and team approaches and refine your strategies for spearheading transformative change initiatives.

Topics:

- 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 Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

LEADING IN TIMES OF UNCERTAINTY

Leadership has never been a straightforward endeavor, and the current era presents even greater complexities. Our world has evolved into a more intricate landscape, where the repercussions of our decisions ripple further and hold greater significance. Starting in the latter half of the 20th century, the very nature of change underwent a transformation. Change occurs with greater frequency, the status quo is swiftly replaced, and its impact is felt more profoundly. This course delves into how individuals in leadership roles can adeptly cultivate robust teams, establish meaningful connections with diverse individuals, uphold integrity, foster optimism, and employ process-oriented thinking to tackle complex problems.

Topics:

- Traits of today's effective leader
- The nature of healthy teams
- Creating positive team relationships
- Practicing integrity to build trust
- Encouraging optimism in others
- Using tools for process thinking
- Persisting in the face of adversity

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



LEADING ORGANIZATIONAL CHANGE

Embracing change can be intimidating, yet with proper preparation, it becomes not only feasible but also crucial for achieving success. Navigating organizational change demands effective leadership, meticulous planning, and clear communication. This foundational course focuses on essential aspects of change management, including the formation and cultivation of a change management team, strategic planning, the development of a communication strategy, and the adept management of potential risks. Through interactive and informative sessions, participants will gain expertise in assessing, initiating, and skillfully overseeing change initiatives. This course is target at anyone involved in the change process.”

Topics:

- Addressing the urgency of change
- Identifying your change style and ways to adapt to others’
- Distinguishing between change and transition
- Determining need and readiness for change
- Planning for and communicating change
- Determining risks involved in change management
- Evaluating change management post-implementation

LEADING WITHOUT AUTHORITY: ACCOMPLISHING MORE WITH INFLUENCE AND PERSUASION

Strong leadership skills require the ability to influence upward, laterally, and downward to accomplish organizational and personal goals. The key to influencing others on your ideas, services and concerns is to understand others first before having them understand you. Factors such as power sources and power bases, gender, age, culture, background, circumstances, demographics, work styles, and motivators must be understood before you can start to influence and persuade others.

Topics:

- Sources and bases of power and how to use them to influence others
- Communication styles and how they can be used effectively to influence
- The optimal influencing style for different situations
- How to break deadlocks
- How to trade concessions effectively when influencing and negotiating with others
- Presentation tips to expand your influence

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



MAKING MEETINGS WORK FOR TIME-CRUNCHED LEADERS

Transform your approach to meetings with this course designed to tackle the pervasive issue of unproductive meetings. Inefficient meetings are often identified as the leading productivity obstacle in all types of organizations and this course equips you with essential skills to revamp meeting dynamics. Learn effective techniques for both leading and participating in meetings, empowering you to maximize the impact of 5.6 hours per week, on average, that employees spend in meetings.

Topics:

- 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 Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

SOLVING LEADERSHIP CHALLENGES

Designed for aspiring and seasoned leaders alike, this transformative program delves into a spectrum of leadership intricacies, offering strategic insights and practical techniques to overcome common challenges. Engagement lies at the heart of effective leadership, and in this course, participants will explore innovative strategies to ignite and sustain engagement among team members. Attendees will learn how to create a thriving workplace culture that nurtures enthusiasm, commitment, and collective success. Through interactive discussions and hands-on activities, attendees will discover methods to cultivate skills, foster growth, and empower individuals to excel and glean strategies for providing steady guidance that maintains momentum and motivates teams during periods of transition.

Topics:

- Identify key issues that present problems for leaders
- Apply root-cause analysis to understand leadership challenges
- Analyze factors affecting individual motivation and performance
- Apply tools to improve individual, team, and organization performance

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



STRATEGIC THINKING

Strategic thinking is a deliberate and logical cognitive process centered on analyzing pivotal factors that shape an organization's success. Essential for effective leadership, strategic thinking skills empower leaders to guide their organizations adeptly. Engage in an interactive, hands-on workshop that pinpoints essential components of strategic thinking. Tailored for managers and leaders, this session evaluates your strategic aptitude and equips you with practical tools to seamlessly integrate strategic thinking into your daily tasks. You'll construct a personalized strategic action plan that fosters effective communication and collaboration.

Topics:

- Critical elements and best practices in strategic thinking
- Characteristics of strategic leaders
- Determine how to improve your strategic thinking skills and develop an action plan
- Moving from tactical to strategic thinking
- Application of strategic thinking in the workplace and how to build it into your team's culture
- Assess your ability to think and act strategically

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



MANAGEMENT & SUPERVISION COURSES



BUILDING AND SUSTAINING HIGH FUNCTIONING TEAMS

High performing teams are productive, efficient, and work toward shared goals. 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, you gain increased self-awareness and learn how to build collaborative and motivated teams. You will also develop personal development plans to productively apply skills and strategies acquired in the training.

Topics:

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

BUILDING TRUST

Trust is the foundation for building strong teams, creating a positive work culture, and producing results. When trust is present, people start to take ownership of their responsibilities, help one another out, speak highly of one another, communicate more often, and be more productive. This workshop works with participants to build a high-trust workplace and helps you understand the leadership behaviors and approaches that build trust and increase performance, engagement, and commitment. Additionally, you will be able to explore specific areas you want to improve in your personal trust-building behaviors.

Topics:

- Core ingredients that impact your credibility and build your self-trust
- Identify the behaviors that increase your trust in relationships
- Steps for building trust on your teams and in your organizations
- Improve your personal trust-building behaviors

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



BUILDING VIRTUAL AND REMOTE TEAMS

In this two-hour workshop, participants learn to address the challenges of remote work by reducing virtual distance and fostering genuine connections within the team and organization. The workshop emphasizes the negative impact of relying solely on technology for communication and offers strategies for improving innovation, trust, satisfaction, clarity, and project success. By the end of the training, attendees will have the skills to strategically build emotional and psychological connections among remote team members, enhance communication abilities, and establish efficient systems for remote work.

Topics:

- Build and lead virtual and remote teams for increased productivity and enhanced performance
- Team building, interpersonal skills, building and sustaining trust, effective use of influence
- Framework for building or revitalizing virtual teams
- Interactions and activities to create a solid foundation for a virtual team

Course Length:
2 hours

Course Format:
Classroom ILT
Virtual ILT

CLEAR COMMUNICATION SKILLS FOR MANAGERS AND SUPERVISORS

Excellent communication skills are vitally important to highly effective leadership. The ability to communicate with confidence, clarity and emotional intelligence is our strongest leverage in such a competitive world. Yet, work is often hampered by ineffective or misleading information. This intensive workshop provides guidance on advanced-level communications skills specifically for those who manage and direct others. You receive concrete skill-building tools and learn strategies to enhance your oral and written communications. You also identify your own preferred communication style for giving direction to others and the implications of these preferences.

Topics:

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

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



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 you how to design delegation plans for your 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:

- Benefits of delegating effectively
- 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 Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

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. You learn how EQ affects interpersonal relationships and decision-making, and learn ways to improve your interpersonal relationships, become a better listener and leader and increase your confidence and self-esteem.

Topics:

- 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 Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



ENERGY MANAGEMENT: MAINTAINING YOUR OWN MOTIVATION

In a world where constant demands can drain enthusiasm, this course empowers participants to master the art of sustaining motivation and vitality. Through insightful lessons, practical techniques, and self-assessment tools, you'll discover how to effectively manage your energy levels, reignite passion, and overcome burnout. Whether you're seeking to excel in your career or find balance in your life, this course equips you with essential skills to fuel lasting motivation and achieve your goals.

Topics:

- Understand the difference between managing personal energy and time
- Explore practical ways for renewing four dimensions of energy
- Self-awareness and goal setting
- Mindfulness and stress reduction

FOSTERING ACCOUNTABILITY, ADAPTABILITY, AND RESILIENCE

Customer, workforce, and organizational goals and challenges change constantly, and you never know what the day is going to bring. To best combat this unpredictability, leaders need to be experts in both adaptability and resilience. In a leader's day-to-day, challenges will arise, and some scenarios may not play out like you hope. Adaptability and resilience can help guide you through these situations, and ultimately lead you to achieve your goals.

Topics:

- How building competencies in accountability, adaptability, and resilience improves individual and organizational performance
- Fostering accountability by improving commitment and clarity
- Fostering adaptability by improving emotional agility and procedural agility
- Fostering resilience by improving balance and a strategic view

Course Length:
1/2 day

Course Format:
Classroom ILT
Virtual ILT

Course Length:
2 hours

Course Format:
Classroom ILT
Virtual ILT



FOSTERING AND MAXIMIZING EMPLOYEE ENGAGEMENT

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:

- 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

IS MANAGEMENT FOR YOU? – A SUPERVISOR’S JOB PREVIEW

Transitioning from a technical expert who does the work to a supervisor who manages technical experts doing the work can be challenging and often surprising. This course introduces you to the roles and responsibilities of a supervisor or entry-level manager to help them determine if supervision is an appropriate career path. You will examine what makes a good 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 you in the decision to pursue a supervisory role.

Topics:

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

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



KNOWLEDGE MANAGEMENT

Organizations have a wealth of knowledge accessible through the people they touch internally—like employees—and externally—such as stakeholders. An organization that can capture, store, and retrieve knowledge effectively is one where employees are empowered to change and develop new methods, thoughts, and strategies that 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 teaches you how to initiate a knowledge management program at work. When it comes to knowledge management, any organization can implement a strategy that will help achieve its performance goals.

Topics:

- Basic concepts of knowledge management (KM)
- “Dos and don’ts” of KM
- KM life cycle
- KM models and best practices
- Implementation of a KM system

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

MAKING DATA-DRIVEN DECISIONS

Though the pronunciation of “data” might spark some disagreement, it’s hard to argue with the idea that data literacy has become an essential skill in today’s workplace. Making data-driven decisions is foundational to an organization’s success and understanding how to use and apply data is imperative to informing those decisions. This course gives you the tools and knowledge to analyze and apply data to decision-making, risk assessments, and other strategic goals.

Topics:

- Defining data-driven decision-making
- Exploring concepts such as data categories, standards, sources, management, data types, and data sets
- Letting data work for you
- Using data to communicate with leadership and technical staff
- Utilizing, applying, and gaining support for data-driven strategies

Course Length:
1/2 day

Course Format:
Classroom ILT
Virtual ILT



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 incessantly. This workshop shows you how to harness the energy and excitement of the new to accelerate achievement and results. This course helps you increase your 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 OPM's Executive Core Qualifications (ECQs) (i.e., leading change, leading people, results driven, business acumen, building coalitions) and fundamental competencies. The majority of the class time is spent in discussion, reflection, and action-learning activities to help leaders envision, market, and implement changes and implement changes designed by others.

Topics:

- Fundamentals of organizational 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

Course Length:
3 days

Course Format:
Classroom ILT
Virtual ILT

MANAGING THE PERSONAL IMPACTS OF ORGANIZATIONAL CHANGE

In the fast-paced world of work, change is a 'must' more so today than ever before. But for many of us, the familiar routines are preferable to trying something new. This interactive workshop helps all levels of staff understand the distinct phases and personal impacts of organizational change and provides tools and techniques for managing those impacts. This workshop also provides an opportunity for you to share your experiences and feedback and work through the changes you are personally experiencing within your organization.

Topics:

- Personal and emotional impacts of organizational change
- Recognizing the different phases of change
- Applying tools and techniques for assessing and managing your role in organizational change
- Providing input and feedback on organizational change initiatives

Course Length:
2.5 days

Course Format:
Classroom ILT
Virtual ILT



MANAGING VIRTUAL/HYBRID TEAMS

Embrace the evolving landscape of remote work and virtual leadership with this course tailored to the needs of modern teams. In an era where remote and hybrid team structures have become the norm, this course equips supervisors with the essential skill set to lead teams effectively across geographical distances. Drawing on cutting-edge research, participants will explore techniques to foster trust, address communication hurdles, and navigate the challenges of virtual leadership. Through interactive group work and discussions, this course facilitates the development of crucial abilities needed to manage hybrid teams, while also prompting introspection into personal biases and concerns. Emerge ready to excel as a leader in today's work environment.

Topics:

- Benefits and drawbacks of remote work arrangements
- Explore individual managerial attitudes, biases, and preferences towards remote work
- Identify the top challenges when it comes to leading remote employees
- How to effectively communicate with remote employees
- Strategies for providing feedback to remote workers
- Ways to motivate and connect with remote employees

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

MOTIVATING YOUR EMPLOYEES

Employee motivation is becoming increasingly important in the workplace, and experts universally agree 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 shows you how to get the best out of a confident, motivated set of employees and effective techniques for motivating them.

Topics:

- 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 Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



OUTCOME THINKING

“Outcome Thinking” is a dynamic approach to planning and preparation that harnesses the full potential of virtual connectivity. Recognizing that planning inherently follows a non-linear trajectory, this course explores how the rapid accessibility of information, and the vibrant online planning community can empower individuals to adapt and optimize their strategies towards desired outcomes. In an era where traditional plans may quickly become outdated, this model equips participants with the skills to finely tune and adapt their approaches rather than being confined to rigid, obsolete strategies. By doing so, it serves as an effective remedy against decision-making pitfalls rooted in outdated industrial age thinking and assumptions.

Topics:

- Exploring the tools of resilience and agility in the virtual community
- Quickly identifying and bypassing barriers to progress, both intrinsic and extrinsic
- Building a habit of balancing differences and alignment to avoid noise and groupthink

Course Length:
1/2 day

Course Format:
Classroom ILT
Virtual ILT

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. You will have opportunities to practice these skills through discussions, role-play activities, and case studies.

Topics:

- SMART (Specific, Measurable, Achievable, Realistic, and Timely) goal setting
- Monitoring performance
- Diagnosing performance issues and providing feedback
- Motivating employees
- Rewards and recognition

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



STRATEGIC PLANNING

Unlock the potential of strategic planning, an essential yet often underestimated tool crucial for organizational success. Dive into the comprehensive evaluation of opportunities and risks across various dimensions, steering your team's trajectory, aligning resources effectively, and establishing goals at all operational tiers. Whether you're tasked with developing a strategic plan or applying it within your team's context, this course equips you with the precise methodology for achieving mastery.

Topics:

- Understanding the purpose for strategic plans and the planning process
- Choosing the appropriate methods, tools, and processes to develop strategic plan (including but not limited to SWOT and PEST analyses)
- Developing a strategic mission, vision, and unique value statement for your organization
- Building a strategic plan and crafting an executive summary
- Translating strategic imperatives into goals and actions
- Identifying ways to align the organization toward a single purpose

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

TECHNIQUES FOR MANAGING THE MULTI-GENERATIONAL MIX

In the modern workplace, diverse generations, each with distinct experiences and viewpoints, collaborate. This course establishes a solid groundwork for comprehending the variations among generational cohorts and demonstrates how managers can harness these distinctions to enhance organizational efficacy. Engaging in discussions and exercises, participants gain insight into best practices when collaborating with each generation, dispel misconceptions, and refine communication strategies to optimize each group's unique strengths.

Topics:

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

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



WRITING PERFORMANCE OBJECTIVES

Setting effective performance objectives helps promote and improve employee effectiveness, motivation, and resiliency by providing clear individual goals and steps or career development and showing how their performance aligns with organizational strategy. Engage in hands-on practice to create performance standards tailored to your agency's performance management framework. Delve into the advantages of setting clear expectations, aligning with organizational missions, and utilizing the SMART (Specific, Measurable, Achievable, Realistic, and Timely) goals model. Master the art of communicating these expectations and instill accountability within yourself and your team.

Topics:

- Goal setting
- Critical elements
- SMART model
- Ratings process
- Feedback and communication

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



INTERPERSONAL SKILLS COURSES



BUSINESS ETIQUETTE

Creating and maintaining a high-functioning organization that fosters strong relationships and high morale among all employees requires that everyone behaves according to the highest standards of professional behavior. Discover the principles of exemplary behavior, cultivating robust relationships and boosting morale across the team. Through this course, you'll gain the skills to navigate social settings adeptly and differentiate between suitable and unsuitable behaviors, ensuring a respectful and harmonious workplace environment.

Topics:

- Definition of business etiquette and its importance in the workplace
- Professional communication including face-to-face, telephone, email, and formal business letters
- Appropriate and inappropriate workplace attire

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

COMMUNICATION SKILLS AND STRATEGIES FOR FEDERAL EMPLOYEES

Federal agencies are required to communicate with a wide range of stakeholders including Congress, oversight agencies, community stakeholders, private industry and academia, and internal staff. Selecting the right communication tools and strategies can dramatically affect the success of these interactions.

Designed exclusively for federal agency employees, this course focuses on enhancing team efficiency, fostering stronger relationships, and promoting mission success through a unified approach to engaging external stakeholders. The course offers an immersive and introspective learning experience, incorporating numerous exercises for participants to assess and refine their communication skills through real-world scenarios. Delving into customer relationships, the course materials serve as a vital resource to identify potential roadblocks hindering success and guide improvements, such as acquiring technical proficiency, recognizing diverse customer needs, and mastering advanced communication techniques. Participants explore topics ranging from active listening and problem-solving to feedback integration, ensuring a holistic skill set for effective communication.

Topics:

- Analyze the effectiveness of alternative communication methods (e.g., by phone, email, instant-messaging, videoconferencing, and in person)
- Techniques for enhancing rapport with internal and external stakeholders and customers
- Strategies to provide constructive internal feedback
- Strategies for leadership and teambuilding through effective communication
- Techniques for resolving conflicts

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



CONVERSATIONS FOR SUCCESS

How effectively you communicate with your colleagues and managers affects the level of trust you establish with them, plays a role in preventing or resolving conflicts, and contributes to the quality of your relationships, all which affect your overall ability to achieve your performance goals. This course teaches you how to assess your personal communication style, apply communication skills to work plan conversations, receive constructive feedback during conversations, and plan for and participate in difficult workplace conversations.

Topics:

- Identifying your preferred style of communication
- Strategies for interacting effectively with a wide range of communication styles
- Delivering clear, concise messages to peers, supervisors, and clients
- Using open communication skills, enhanced with an awareness of Emotional Intelligence

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

CREATIVE PROBLEM-SOLVING

In a rapidly evolving world, the ability to tackle challenges with creativity is essential. This course guides you through proven methodologies to break down complex problems, think outside the box, and generate novel solutions. Through interactive exercises and real-world scenarios, you'll enhance your analytical thinking, develop a creative mindset, and collaborate effectively with diverse teams. Equip yourself with the skills to innovate, adapt, and thrive in any problem-solving scenario, elevating your impact in both professional and personal spheres.

Topics:

- How 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
- Building consensus and alignment

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



CRITICAL THINKING SKILLS

Accelerated change, constant reorganization, and downsizing 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 your professional world. One of the elements of critical thinking is that “one size fits all” does not work.

Topics:

- Impacts of mental models on critical thinking
- Three risk analysis models for measuring risk and impact on performance
- Questioning assumptions and measuring how they generate perceptions and behaviors in organizations
- Applying systems thinking to resolve organizational challenges
- Methods to build consensus and alignment
- Effective communication tips and techniques

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

DELIVERING VIRTUAL PRESENTATIONS

In an era of expanding virtual audiences, mastering the art of reaching people through technology is imperative. This course highlights the crucial shift towards effective virtual presentations, emphasizing the need to adapt presentation skills and best practices to the online medium. Expert virtual presenters grasp the unique challenges of engaging remote audiences and excel by tailoring their approach to foster meaningful connections in the digital realm.

Topics:

- Competing against diminished attention spans, increased home and work life distractions, and conflicting priorities
- Compensating for lack of body language
- Tips for increasing your level of confidence and presence in an online environment

Course Length:
2 hours

Course Format:
Classroom ILT
Virtual ILT



EFFECTIVE BUSINESS WRITING

In today's digital landscape, proficient business writing is indispensable across all organizations, transcending size and purpose. This course delves into the art of effective communication, addressing various contexts such as technical direction, project updates, new initiatives, and detailed reports. Grounded in established resources like the Executive Secretariat Style Guide, Federal Acquisition Regulation, and Plain Language Initiative, this interactive course empowers federal employees to enhance their writing efficiency and impact. Through exercises and engagement, participants grasp the writing process's nuances to elevate their business correspondence, spanning emails, reports, solicitations, and more. Additionally, they acquire the invaluable skills of revision, editing, and proofreading, ensuring exceptional document quality and advancing personal and professional growth.

Topics:

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

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

EFFECTIVE CONFLICT RESOLUTION

While many of us try to avoid conflicts because they can be frustrating, negative, or uncomfortable, positive conflict is constructive in nature. It produces new ideas, solves continuous problems, provides an opportunity for people and teams to expand their skills, and fosters creativity. This course covers a variety of topics specific to resolving conflicts in the workplace. Discussion includes 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.

Topics:

- Recognize your own and others' conflict management style
- Assessing conflict situations
- How to apply conflict management techniques and strategies to make better choices in responding to conflict
- Ladder of Inference
- Direct and indirect communication styles
- Facilitation techniques

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



EFFECTIVE LISTENING

This engaging course offers a comprehensive exploration of the nuanced distinction between mere 'hearing' and active 'listening.' It delves into the multifaceted art of cultivating the skill of active listening, laying the foundation for enhanced communication and interpersonal interactions. This concise yet impactful course hones the art of attentive listening for individuals at various stages of their career. Participants will master active listening techniques, understand the interplay of emotions in communication, and recognize the pivotal role of listening in productive brainstorming. This course empowers professionals with the skills to elevate their communication, foster collaboration, and enhance their overall effectiveness.

Topics:

- Effective listening skills in face-to-face and voice only situations
- Engaged vs. active listening
- Barriers to effective communication
- Tips to improve your active listening and engagement skills

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

EFFECTIVE TEAM COMMUNICATION

In this course you will learn the important dynamics of group communication and learn how to put them into practice to improve teamwork. Participants will discover how to manage conflict and work with difficult group members, negotiate for preferred outcomes, improve group communication in virtual environments, develop a better overall understanding of human interaction, and work more effectively as a team. By the end of the course, you will have a comprehensive understanding of effective group communication and teamwork, along with practical skills to enhance your abilities in these areas.

Topics:

- Defining and understanding team communication
- Exploring the value of working as a team and building team trust
- Recognizing the critical role of communication skills in a team
- Organizing a team (norms, ground rules, team contacts, stages of team development)
- Developing problem-solving skills

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



EMAIL ETIQUETTE AND MANAGEMENT

Amidst the evolving blend of virtual, hybrid, and in-person work models, email has emerged as a central communication tool, yet its misuse remains prevalent. In this targeted two-hour workshop, uncover the potential pitfalls of ineffective email communication. While email offers numerous advantages, it can inadvertently lead to problems, misinformation, time wastage, and unfavorable perceptions. Gain insights into the intricacies of crafting impactful email messages to avoid such pitfalls, ensuring efficient and effective communication in the modern workplace landscape.

Topics:

- Tips to improve your email writing skills in simple steps
- How to avoid common errors in email messages
- How to receive higher response rates from recipients
- Determining when email is the appropriate form of communication and when it is not

Course Length:
2 hours

Course Format:
Classroom ILT
Virtual ILT

ETHICAL DECISION-MAKING

Ethics policies and procedures apply to all employees, so everyone needs to be conversant with the applicable regulations. This class delves into fundamental ethics concepts, individual responsibilities, and the intricacies of ethical decision-making. Fostered by an interactive approach that welcomes questions, the course is customized to your organization, adapting to its distinct provisions. Empower your team with the knowledge and resources needed to navigate ethics-based challenges effectively and uphold the highest standards of conduct.

Topics:

- Common sense, everyday ethical issues
- Personal responsibility
- Personal approach to solving those everyday issues

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



FACILITATING EFFECTIVE VIRTUAL MEETINGS

Master the art of orchestrating dynamic virtual and hybrid meetings through this workshop. Beyond technology, discover how to cultivate an active participant role and design compelling sessions that harness virtual tools to their fullest potential. Acquire the skills to seamlessly transfer your in-person facilitation expertise to the online realm, enabling successful collaborative endeavors in blended settings. Whether leading remote teams or conducting individual meetings, you'll gain experiential insights and techniques for fostering engagement, trust, and efficient decision-making. Address challenges related to inclusivity and engagement in remote meetings and acquire tools for immediate implementation in enhancing communication within remote teams.

Topics:

- Apply proven techniques for managing and facilitating meetings and group discussions
- How to plan, prepare agendas, encourage useful participation, control disruptions, and keep the meeting focused and on track
- Conducting meetings that have an agenda with clear objectives
- Best practices and techniques to ensure that meetings are productive and effective.

Course Length:
2 hours

Course Format:
Classroom ILT
Virtual ILT

FACILITATION SKILLS

Enhancing your facilitation skills will help you improve meeting outcomes and efficiency, effectively manage nonproductive conflicts, and help to drive accountability for the group. This course is designed to prepare employees 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. The course presents techniques for focusing discussions and building consensus, facilitating brainstorming sessions, and running focus groups.

Topics:

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

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



THE MOMENTARY MEETING

This comprehensive 4-hour training on effective meeting management equips participants with the essential skills and strategies needed to transform meetings from timewasters into powerful tools for collaboration and decision-making. Topics covered include defining meeting purposes, meticulous preparation, adept facilitation techniques, nurturing open communication, leveraging technology, mastering time management, and ensuring effective follow-up. The training delves into the nuances of various meeting types, especially virtual meetings, while emphasizing cultural sensitivity and professionalism. Through interactive exercises, real-life examples, and the development of actionable plans, participants will leave with the knowledge and tools to lead more efficient and productive meetings, fostering enhanced teamwork and organizational success.

Topics:

- Looking forward to meetings that are quick, efficient, and productive
- Discovering the extraordinary leverage that the online meeting environment provides for streamlining interaction while increasing the power of relationships
- Building a track record for successful meetings that you can bring to other elements of your organization, top to bottom

Course Length:
1/2 day

Course Format:
Classroom ILT
Virtual ILT

NEGOTIATION STRATEGIES AND TECHNIQUES

Navigate the art of negotiation in everyday scenarios with this course that sheds light on the inherent process of finding resolutions through mutual compromise. By bolstering your negotiation skills, you're equipped to deftly address conflicts and establish agreements even in challenging situations. Delve into negotiation strategy, stakeholder interest identification, alternative agreement considerations, and adept communication. Engaging with mini-case studies, you'll acquire techniques to enhance your negotiation performance, coupled with hands-on practice sessions that reinforce the strategies learned during the course.

Topics:

- 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 Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



POLITICAL SAVVY AND ETIQUETTE: SURVIVING AND THRIVING IN THE WORKPLACE

In the world of work there are some constant, subtle behavioral expectations that are frequently overlooked by both managers and employees: the unwritten rules of etiquette and the skill of political savvy. Many perceptions of work behavior and professional interaction have evolved as the demands of the technologically evolving environment have altered the organizational culture. But we are still judged by how we look and conduct ourselves around others, and our effectiveness can hinge on how we navigate the social, hierarchical, and political landscapes that exist in all organizations.

Topics:

- Understanding nonverbal and body language cues and their meaning
- Reviewing appropriate telephone techniques, leaving voicemail messages, and email communications
- Applying techniques to better handle anger and criticism
- Learning how EEO standards apply in the work environment

PRESENTATION SKILLS: MORE THAN JUST PUBLIC SPEAKING

Enhance your verbal and platform skills to excel in effective communication as a leader, manager, or technical expert. This course focuses on designing, developing, and delivering impactful presentations that convey intricate ideas to a diverse audience. Irrespective of your career level, you'll hone your presentation abilities, receiving constructive feedback from peers and instructors for refinement. Through a comprehensive process, you'll craft and present a five-minute speech, undergoing video recording, critique, and re-performance for continuous improvement.

Topics:

- 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 Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



SETTING AND MANAGING PRIORITIES

Time is one of our most valuable resources, yet we do not always manage it as effectively as we could. In this course you will discover how to set realistic goals and objectives, and the importance of planning and prioritizing your day more effectively. Through exercises and discussions, you will learn tips to manage the demands of others who want and need your time and discover how to personally “audit” your time. This highly interactive course will give you the tools and techniques needed to manage your time and stress proactively, allowing you to discover the key skills needed to be successful and add value to your organization. Uncover new methods to cut timewasters, set goals and prioritize with a healthy perspective on what matters most.

Topics:

- Identifying your priorities
- Work what matters
- How to avoid overload
- Creating focus
- Developing your personal process
- Creating lasting habits

Course Length:

1 day

Course Format:

Classroom ILT

Virtual ILT

SUCCESSFUL MENTORING SKILLS

Successful mentoring programs encourage relationships that support the learning and development of employees and serve as a vital component of an effective succession strategy. Mentoring has also been shown to improve job satisfaction and employee motivation and engagement. Effective mentoring requires commitment and the development of a specific skill set. This course provides the skills necessary to mentor effectively to produce rapid improvement and lasting results.

Topics:

- 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 Length:

2 days

Course Format:

Classroom ILT

Virtual ILT



TRUSTWORTHY CUSTOMER SERVICE®

Providing a positive customer experience to individuals who interact with government agencies is critical to improving transactions across government. Once an organization understands exactly what a customer wants, they can react in the most efficient way. Strong customer service within an agency will help increase efficiency and lead to overall performance improvement. Enhance your customer service skills, fostering stronger relationships and heightened individual and organizational effectiveness in this interactive course. Explore techniques to identify customer needs and master core attributes of exceptional service, learning actionable tips and techniques for immediate application to your projects.

Topics:

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

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

CONSULTING SKILLS: IMPROVING 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. Learn to adopt a consultant's mindset for enhancing both personal and organizational performance through this course. Discover the core principles of effective consulting, exploring its value within your organization. Acquire essential components of the consulting process and practical tools, enabling their application in your job functions. This interactive course incorporates problem-solving techniques, and hands-on exercises, allowing you to practice applying these skills to real challenges you encounter.

Topics:

- 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 Length:
3 days

Course Format:
Classroom ILT
Virtual ILT



DIVERSITY, EQUITY, INCLUSION & ACCESSIBILITY (DEIA) COURSES



ACTIVE ALLYSHIP

Embark on a journey of intentional and impactful allyship through this course, where you'll grasp the essence of building trust-based relationships. Discover the art of advocating for social justice and inclusion by those within privileged groups, striving to uplift marginalized communities. Aspiring to foster growth and trust, allyship involves behaviors like activism, inclusive language use, and combatting prejudice. Participants will master the art of active allyship within and beyond the organization, enhancing communication skills, addressing challenges, expanding partnerships, and fortifying community relationships.

Topics:

- Learn how to respond to inappropriate behavior
- Incorporate inclusive language
- Understand and use privilege to support others
- Recognize the value of being an active ally

Course Length:
2 hours

Course Format:
Classroom ILT
Virtual ILT

ADVANCED UNCONSCIOUS BIAS

Geared toward hiring managers, interviewers, and HR professionals, this course helps you develop new tools and procedures that increase your ability to reduce bias in your decision-making. You will develop and practice new techniques and deepen skills for mitigating bias, leaving you with an ability to use bias mitigation tools in various work settings.

Topics:

- How to bring awareness to your biases to mitigate them when they are their most potent
- Exploring policies and practices to mitigate bias in your daily work and give you improved operational plans for your office
- Uncovering specific areas where bias may be present in your organization, learn tools, and uncover opportunities to mitigate bias
- Exploring how bias can affect interviewing
- Developing and practicing behavioral interview skills to mitigate bias in hiring practices such as scorecards, open-ended questions, and experiential interviewing
- Creating a repeatable method to interview people that mitigates bias

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



DEIA COMMUNICATION SKILLS: COURAGEOUS CONVERSATIONS FOR LEADERS

Are you a leader who wants to effectively communicate with your team about matters of diversity, equity, and inclusion and you are struggling with what to say? Do you find yourself paralyzed by the topic of racism? Are you learning to recognize microaggressions and facing your conscious and unconscious biases? Still learning how to use your privilege to support your employees and shape your organization’s culture and systems? If you’re unsure of what to say, what questions to ask, and how to listen better as a leader and an ally, this course is for you.

Our workshop will help you develop as a leader and cultivate meaningful relationships with your team through the lens of diversity, equity, and inclusion. You will evaluate how you show up with and for your team, learn what it means to check-in with them, and create a psychologically safe and inclusive environment. In this workshop, you will lean into the vulnerability required to get comfortable with discomfort in a safe and collaborative environment with other leaders.

Topics:

- Learning the value of having these conversations
- Build trusting relationships
- Discover authentic leadership
- Peek into what’s possible for developing more meaningful relationships with your employees

**Course Length:
2 days**

**Course Format:
Classroom ILT
Virtual ILT**

FOUNDATIONS OF DIVERSITY, EQUITY, INCLUSION, AND BELONGING

You’ve heard the words and terms, but what are the distinct differences, and how do they intersect? In this workshop, we define diversity and related terminology such as inclusion, equity, and belonging, and why they are important to understand. We discuss how having a diverse team leads to increased effectiveness and performance, and the factors and conditions that lead to those results. By fostering an environment of respect, collaboration, positivity, and belonging, you will enable your organization to succeed and your team to flourish.

Topics:

- Establish foundational awareness and a common base language with which you can build and grow as a team
- Recognize the importance of welcoming and valuing differences in the workplace
- Begin the process of identifying the difference between various types of biases to treat people with dignity and respect
- Recognize commonalities within your team and among others who are different
- Help each other grow and realize our full potential by creating awareness and action

**Course Length:
3 days**

**Course Format:
Classroom ILT
Virtual ILT**



INCLUSIVE LEADERSHIP: LEADING DIVERSE TEAMS

Inclusive leaders are aware of their stereotypes, biases, and mental models that hinder valuing diverse teams. In this course, you learn how to demonstrate an authentic appreciation for the diverse identities, backgrounds, talents, abilities, and contributions of all team members, as well as a willingness to learn from diverse perspectives. By valuing and respecting all individuals for their talents and contributions and encouraging the input and initiative of all employees, leaders and managers can create a high-engagement culture.

Topics:

- Moving from unconscious bias to conscious inclusion
- Increasing the transparency of team decision-making and processes
- Examining the distinction between “equity” and “equality”
- Demonstrating humility and courage
- Providing feedback in diverse teams
- Strategies for building and fostering an inclusive environment
- Helping team members develop more empathy and understand each other’s perspectives

LEVERAGING DIVERSITY & UNCONSCIOUS BIAS

Inclusive leadership is a critical capability to leveraging diverse thinking in a workforce with increasingly diverse markets, customers, and talent. This course defines inclusive leadership and discusses why it’s important. You will learn how to take personal responsibility for building a more inclusive environment and how to use listening and recognition skills for better communication and collaboration.

Topics:

- Key elements of inclusive leadership
- Combating unconscious bias and stereotypes
- Cultural intelligence
- Being a more inclusive leader
- Barriers to inclusive leadership
- Having difficult conversations

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



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. You will engage in self-reflection and discussions to better understand how diversity, inclusion and accessibility 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:

- How diversity and inclusion lead 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 Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

UNCONSCIOUS BIAS

Each and every one of us is biased toward something, somebody, or some group. These biases allow us to filter information and navigate our complex world. But not all biases serve us well. So, what can we do about it? First, we become sensitized to what bias is and why we have it (awareness), then we recognize our own biases (introspection) and improve our ways (action). This process of awareness, introspection and action leads to building better relationships, an important keystone of our business. As professionals in the workplace, being aware of what is below the surface for us will enable us to interact with our colleagues, clients and employees with greater insight. This awareness and understanding about the unconscious bias in us and others will enable us to build better relationships and step into the challenging work of dismantling systematic racism. Join us for this interactive workshop where we will create awareness around our own biases, think about where we can change our behavior and learn to take action.

Topics:

- Awareness around your own biases
- How your biases impact your behavior
- Practical tools and skills for overcoming bias in the workplace and beyond
- How to design an Action Plan

Course Length:
2 hours

Course Format:
Classroom ILT
Virtual ILT



HUMAN CAPITAL & HUMAN RESOURCES COURSES



APPLIED HUMAN RESOURCES MANAGEMENT (HRM) FOR SUPERVISORS

Effective supervisors increase employee motivation, communicate expectations, and ultimately increase organizational performance. This four-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. You will apply human resources management concepts to the challenges that you face in your day-to-day management of your employees. Course content, individual activities, and a final course exercise illustrate the linkage among the different human resources functional areas.

Topics:

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

Course Length:
4 days

Course Format:
Classroom ILT
Virtual ILT

INTRODUCTION TO NAVIGATING THE FEDERAL HIRING PROCESS

The federal government is unique in its hiring practices, including specific laws, regulations, and policies. While it is important that you understand the requirements, as a manager, it is especially important that you understand and actively embrace your role in the process to ensure that you interview and select the best candidates that will meet your hiring needs. Designed for new supervisors, this course dispels recruitment myths and equips you with insights into the federal hiring process. Delve into your responsibilities and collaboration with human resources specialists, learning effective planning strategies and information sharing. Explore diverse hiring options and authorities, ensuring you are adept at selecting the best candidates to fulfill your organizational needs.

Topics:

- Specific laws, regulations, and policies that apply to federal hiring processes
- How to create a position description
- Steps in conducting a job analysis, which serves as a fundamental source of information required throughout the hiring process

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



LABOR MANAGEMENT RELATIONS IN THE FEDERAL GOVERNMENT

While managers and supervisors do not need to be labor management experts, it is extremely important that they have a foundational knowledge of basic rights in the federal workplace. This course provides you with a basic overview of labor management relations in federal agencies. You will 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:

- 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

MANAGER'S GUIDE TO DISCIPLINE

In this comprehensive course, we delve into the pivotal principles that underpin successful employee discipline, enabling managers to navigate disciplinary issues with finesse and cultivate positive outcomes. By exploring the essential tenets of consistent and equitable procedures, transparent communication, and well-defined expectations, participants will acquire a toolkit for addressing behavioral concerns. Participants will gain a comprehensive understanding of the impact that clearly defined expectations can have on employee behavior. We explore how setting realistic and attainable standards can inspire motivation, accountability, and a commitment to professional development. Whether you're an experienced manager seeking to refine your approach or a new supervisor stepping into the realm of employee discipline, this course equips you with the knowledge and tools needed to navigate disciplinary challenges with confidence. By embracing these principles, you'll be well-prepared to create an environment of growth, fairness, and productivity that benefits both individuals and the broader organization.

Topics:

- Communicating expectations
- Dealing with unacceptable conduct
- Utilizing probationary trial periods
- Reasonable accommodations
- Substance use disorders (drug-free workplace)
- Disciplinary actions

Course Length:
3 days

Course Format:
Classroom ILT
Virtual ILT

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



RETIREMENT: CSRS/FERS PRE-RETIREMENT SEMINARS

Colleague's retirement courses are designed to stimulate positive thinking toward proper planning for post-retirement years for federal employees covered by the Civil Service Retirement System (CSRS)/Federal Employees Retirement System (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 seminar 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:

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

RETIREMENT: MID-CAREER RETIREMENT PLANNING

This workshop is recommended for FERS employee with 5-20 years of federal service or who entered federal service mid-career. This course helps you gain an understanding of federal benefits while identifying financial planning strategies for success. This workshop is for employees 15-20 years away from retirement eligibility, when employees should begin making financial decisions about retirement goals. Emphasis is placed on the Thrift Savings Plan (TSP) as this will be a sizable portion of the FERS employee's retirement benefit.

Topics:

- Understanding the Federal benefits package
- Exploring the requirements for retirement eligibility
- Reviewing leave, healthcare, and life insurance benefits
- Reviewing annuity calculations
- Exploring financial components of retirement
- Reviewing TSP benefits

Course Length:

• **1 day**
FERS or CSRS
Pre-Retirement
Seminar

• **2 to 3 day**
FERS or CSRS
Pre-Retirement
Seminar

• **2 to 3 day**
combined FERS
and CSRS Pre-
Retirement
Seminar

Course Format:

Classroom ILT
Virtual ILT

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



RETIREMENT: NEW EMPLOYEE RETIREMENT AND FINANCIAL PLANNING

This workshop is for FERS employees with 2-5 years of Federal Service. This early-career FERS class is a comprehensive one-day workshop detailing FERS benefits and financial literacy with emphasis on managing the Thrift Savings Plan (TSP).

Topics:

- Understanding the Federal benefits package
- Examining the 3-tiered retirement plan (FERS, TSP, Social Security)
- Reviewing leave, healthcare, and life insurance benefits
- Exploring components of wise financial planning
- Understanding the TSP – funds, allocation, Roth TSP

RETIREMENT: THRIFT SAVINGS PLAN

This workshop introduces the Thrift Savings Plan (TSP) to new employees and provides a refresher for those already in the plan. The agenda focuses on the basics of TSP account management. Discussion includes types of TSP contributions, differences between traditional and Roth contributions, and a brief overview of TSP investment funds. The workshop details TSP contribution rules and takes employees through the information needed to make the best choices for their future.

Topics:

- Determining if your contribution election is right for you
- Understanding how to receive the full match if eligible
- Recognizing the impact of reaching the contribution limits early
- Determining when to pay taxes on your TSP contributions
- Locating resources to learn more about the TSP

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

Course Length:
1/2 day

Course Format:
Classroom ILT
Virtual ILT



SUPERVISORY ESSENTIALS: STRATEGIES FOR SUCCESS

Transitioning from a technical expert doing the work to a federal first-line supervisor overseeing others' work can be extremely challenging. This course assists new first-line supervisors develop the competencies 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 you acquire skills to develop strategies for addressing the challenges of making the transition from employee to supervisor/ manager. You will examine leadership practices, review the stages of team development, and identify ways to build trust and cooperation on teams.

Topics:

- Supervisory role and responsibilities
- Communications and feedback
- Performance management and conduct issues
- Leave and attendance policy
- Employee development and Individual Development Plans (IDPs)
- Labor management
- Conflict resolution
- Diversity, equity and inclusion

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

TRUSTWORTHY CUSTOMER SERVICE® FOR FEDERAL HR PROFESSIONALS

Government agencies continue to face the challenge of competing for top talent to fill mission-critical positions across government and maximizing the retention of these employees. Federal HR professionals play a pivotal role in recruiting and retaining top talent, making it critical that they create strong partnerships with their internal hiring managers so that they fully understand the requirements and can collaborate to create the most effective recruitment and retention strategies.

Elevate your federal human capital and human resources expertise through a customized and interactive course designed to enhance customer service skills. This program empowers professionals to forge more impactful partnerships with internal agency customers, bolstering individual and organizational effectiveness. Learn the distinctive facets of human resources management (HRM) customer service, identifying customer needs and applying key attributes to your work tasks. The course combines case studies, individual assessments, and practical techniques, enabling immediate application to ongoing projects and the creation of a personalized development plan.

Topics:

- Defining HRM customer service
- Building customer relationships from personal reputation to competent associate, to expert colleague, to strategic partner
- Building and maintaining customer relationships

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



PROGRAM & PROJECT MANAGEMENT COURSES



ASSESSING ORGANIZATIONAL RISK

This course delivers an initial exploration of the risk management framework, equipping attendees with hands-on insights into the efficient application of risk management principles, methodologies, and resources. The course is uniquely designed to align with the sequence of PMI's Risk Management Standard, while also tailoring content to suit the specific needs of the organizing agency. As the program concludes, participants will have the competence to articulate fundamental project risk management concepts such as project risk, risk mitigation, risk triggers, qualitative and quantitative risk analysis. Moreover, they will be adept at recognizing common risk scenarios within agency projects.

Topics:

- Exploring the key components of a risk management framework
- Exploring various methodologies for identifying, assessing, and addressing risks
- Aligning with PMI's Risk Management Standard and its relevance in organizational risk management
- Learning how to assess and prioritize risks based on their potential impact and likelihood
- Exploring strategies for mitigating identified risks
- Identifying typical risk scenarios that occur within agency projects

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

BREAKING THE CODE: UNDERSTANDING PROJECT MANAGEMENT

All projects, large and small, need to be managed effectively to ensure that the desired outcomes are achieved. Project management is a discipline that includes a set of repeatable processes addressing issue management, risk management, resource management, timeline management, budget management and scope management. This course introduces you to the basic principles and concepts of the discipline of project management, and how mastery of these concepts can improve your performance on project teams.

Topics:

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

Course Length:
3 days

Course Format:
Classroom ILT
Virtual ILT



COST AND SCHEDULE ESTIMATION AND ANALYSIS

The triple constraint theory, also called the “Iron Triangle” in project management, defines the three constraints in project management as time, scope, and cost. This course provides you with a high-level overview of cost and schedule estimation techniques necessary for successful project management. You will 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 initial stages of project execution (preliminary design).

Topics:

- 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 Length:
5 days

Course Format:
Classroom ILT
Virtual ILT

EARNED VALUE MANAGEMENT SYSTEMS (EVMS)

Earned value management (EVM) helps provide the basis to assess work progress against a baseline plan, relates technical, time and cost performance, provides data for pro-active management action and provides managers with a summary of effective decision-making. This course addresses how to effectively apply EVM approaches in project management. You will learn about processes, how they are interrelated, and how they must be integrated to produce an effective EVMS.

Topics:

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

Course Length:
3 days

Course Format:
Classroom ILT
Virtual ILT



ENVIRONMENTAL LAWS AND REGULATIONS

Nearly every government agency is impacted by some environmental laws, regulations, or Executive Orders. This course provides you with 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. We introduce you to the wide range of environmental requirements that apply to government facilities and operations and the resources available to assist staff and managers if you 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 regulatory topics; rather, it aims to educate you as to when to ask questions and to whom they should be directed.

Course Length:
3 days

Course Format:
Classroom ILT
Virtual ILT

Topics:

- 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



FUNDAMENTALS OF FEDERAL PROGRAM MANAGEMENT

Federal agencies increasingly are called upon not just to manage the routine operations of ongoing programs, but to undertake large, complex initiatives to create new programs and services and to adapt and improve ongoing programs in a rapidly changing environment. Large complex change initiatives have become a major feature of agencies once associated with the most routine production operations, whether it be delivering benefits or collecting statistical data. This is driven by factors such as the rapid advance of technology, changing customer preferences for service delivery, and the need to accomplish more with fewer resources.

A specialized discipline of program management has evolved over the past few decades to address the challenges of managing large, complex change initiatives. 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 addresses how to: define risk, apply a risk management methodology in a program and project setting, manage stakeholder expectations, interpret project performance data, and effectively address corrective action issues.

Topics:

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

Course Length:
3 days or
5 days

Course Format:
Classroom ILT
Virtual ILT



INTRODUCTION TO PROJECT SCOPE AND SCHEDULE PLANNING

This one-day workshop provides a condensed yet comprehensive introduction to the fundamental concepts of project scope and schedule planning. Participants will gain a solid understanding of the importance of well-defined scope and effective scheduling in project management. Through interactive discussions, hands-on activities, and practical examples, participants will learn to define project scope, break down tasks, and create a basic project schedule.

Topics:

- Defining Project Scope
- Creating a Work Breakdown Structure (WBS)
- Introduction to Project Scheduling
- Task Sequencing and Dependencies
- Hands-On Schedule Creation
- Scope Verification and Change Management
- Introduction to Stakeholder Engagement
- Monitoring and Controlling Schedules

LEADERSHIP IN ENERGY AND ENVIRONMENTAL DESIGN (LEED®)

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

Topics:

- 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

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

Course Length:
2.5 days

Course Format:
Classroom ILT
Virtual ILT



LIFE CYCLE COST ESTIMATING

Since many decisions are based on cost, it is imperative that the estimates constructed be as accurate as possible. Life cycle cost (LCC) estimating analyzes all costs related to constructing, operating, and maintaining a construction project over a defined period, which becomes an essential component of sound decision-making. This course covers LCC estimation requirements and policies. You will apply various techniques and formulae to construct an LCC estimate analysis and learn how to use LCC estimating in program and project decision-making. This course addresses the topic of LCC estimating from a decision analysis rather than from an estimate development perspective.

Topics:

- Brief history of life cycle cost estimating, current laws, directives, and policies
- 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
- Review of representative cost estimates to apply these skills

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

PROJECT MANAGEMENT ESSENTIALS

Immerse yourself in essential project management concepts and best practices from federal agencies and the private sector through this course. Exploring key aspects—project discipline, planning, teambuilding, and leadership—you'll delve into these areas using the Project Management Institute's PMBOK® Guide as a foundation. With a focus on practical application and incorporation of best practices, the course draws from federal guides and manuals, presenting an intermediate-level expertise akin to accredited graduate-level study.

Topics:

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

Course Length:
5 days

Course Format:
Classroom ILT
Virtual ILT



PROJECT MANAGEMENT FOUNDATIONS AND TECHNIQUES

Discover the essential elements of effective project management in our comprehensive course. Gain a solid understanding of the Project Management Framework, delving into key principles and methodologies. Learn the art of defining and refining project objectives and scope. Dive into the intricacies of creating and evaluating project schedules, exploring tools and tracking methods to ensure timely project completion. Explore the balance between art and science in project cost estimation. Learn how to identify, assess, and mitigate potential pitfalls while proactively ensuring project success. By the end of this course, you'll have a solid foundation in project management, enabling you to initiate, plan, execute, and control projects effectively. Whether you're new to the field or seeking to enhance your skills, this course is your first step towards mastering the art of project management.

Topics:

- Overview of the Project Management Framework
- Project definition and scope
- Building and evaluating project schedules
- Cost estimating
- Project risk management

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

PROJECT TEAM LEADERSHIP AND SUPERVISION

This comprehensive 3-day program is designed to equip participants with the essential skills and knowledge needed to effectively lead and supervise project teams. Through interactive workshops, case studies, and real-world examples, participants will learn how to inspire, guide, and manage teams to achieve project success. The course covers a range of leadership techniques, communication strategies, and team-building approaches, tailored to the dynamic needs of modern project environments.

Topics:

- Understanding the role and responsibilities of a project team leader
- Developing strong communication skills to convey vision, goals, and expectations
- Motivating and recognizing team members' contributions
- Techniques for managing disagreements and promoting constructive resolution
- Handling project setbacks, changes, and uncertainties with resilience
- Providing constructive feedback to enhance individual and team performance
- Leading by example and promoting ethical behavior throughout the project lifecycle

Course Length:
3 days

Course Format:
Classroom ILT
Virtual ILT



PROJECT QUALITY MANAGEMENT

This two-day intensive workshop is designed to equip participants with a deep understanding of project quality management, a critical aspect of successful project delivery. Participants will explore quality principles, methodologies, and tools essential for planning, executing, and monitoring project activities to meet or exceed quality expectations. Through real-world case studies and interactive exercises, participants will learn how to implement effective quality management strategies and ensure project outcomes that satisfy stakeholders and deliver lasting value.

Topics:

- Defining quality requirements and expectations
- Selecting appropriate quality metrics and key performance indicators
- Distinguishing between quality assurance and quality control activities
- Quality control techniques
- Conducting internal and external quality audits
- Introduction to key quality tools such as Pareto charts, Ishikawa diagrams, and 5 Whys
- Incorporating change management into the quality plan
- Implementing processes for continuous quality improvement
- Quality reporting and communication

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

PROJECT RISK ANALYSIS AND MANAGEMENT

This course is designed to introduce you to the foundational aspects of identifying and managing risks during the life cycle of a project. You also acquire the skills that enable you 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:

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

Course Length:
3 days

Course Format:
Classroom ILT
Virtual ILT



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:

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

Course Length:
3 days

Course Format:
Classroom ILT
Virtual ILT



ACQUISITION & 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 principal 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:

- Acquisition authority in the federal government
- Government procurement standards
- Acquisition planning and methods
- Contract types
- Solicitation process
- Contract negotiations and administration

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

ACQUISITION STRATEGIES

The Federal Acquisition Regulations (FAR) allow agencies to select from a variety of different types of contracts when procuring goods and services. Acquisition professionals as well as program managers need to understand the advantages and disadvantages of the distinct types of contracts and work together to select the type that will best meet their programmatic objectives.

This workshop is an opportunity for Contracting Officers, Contracting Officer's Representatives, procurement staff, and project and program 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 CLIN) contracts. You will 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:

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

Course Length:
5 days

Course Format:
Classroom ILT
Virtual ILT



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. You will learn how to determine what is a commercial item and follow a more efficient and cost-effective acquisition strategy. You will 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:

- 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 Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

CONTRACT ADMINISTRATION FOR TECHNICAL REPRESENTATIVES (COR)

This course is designed to help Contracting Officer's 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. We cover the fundamental knowledge and hands-on exercises to help you understand the importance of the COR function as it relates to each stage of the contract administration process.

Topics:

- COR's 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 Length:
3 days or
5 days

Course Format:
Classroom ILT
Virtual ILT



COR TRAINING REFRESHER

This course is designed to review the responsibilities of the Contracting Officer's Representative (COR) in the acquisition process and provides the opportunity for participants to discuss challenges and experiences they have encountered in their roles as CORs. We also include discussions of federal acquisition and contract management processes and present information on latest trends, issues, and concerns in Government procurement.

Topics:

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

PERFORMANCE-BASED MANAGEMENT CONTRACTING

This course helps program managers, project managers, and contracting personnel to better understand how to manage performance-based contracts. We address the processes by which performance-based management contracts are planned, awarded, and managed after award. Content also 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:

- 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 Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

Course Length:
3 days

Course Format:
Classroom ILT
Virtual ILT



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:

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

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

SERVICE CONTRACT LABOR STANDARDS

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

Topics:

- 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 Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

TYPES OF CONTRACTS

This course introduces you 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. You will gain knowledge of structuring and applying incentives pricing and award fee pricing arrangements.

Topics:

- 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 Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



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 you to better understand financial reports. This course treats accounting as a language instead of a technical, expert topic.

Topics:

- Fundamentals of financial reporting
- Fund accounting and fund reporting (balance sheets, revenues & expenditures)
- How to read government-wide financial statements (net assets and activities)
- Generally Accepted Accounting Principles (GAAP) and GASB 34 model
- Budgetary and proprietary accounting
- Standard General Ledger

DETECTING AND PREVENTING FRAUD IN GOVERNMENT ACTIVITIES

Government entities can be susceptible to fraud, which in turn impacts taxpayers. In this course, you will learn strategies to prevent, detect, and investigate government fraud schemes and actions to take when fraud is suspected or detected.

Topics:

- Stages of a government fraud examination, from planning to conclusion
- Tools and techniques to detect fraud
- Internal controls and fraud prevention
- Types of fraud that target government programs
- Appropriate measures for identifying counterfeit and forged documents

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

Course Length:
3 days

Course Format:
Classroom ILT
Virtual ILT



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:

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

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

FEDERAL ACCOUNTING STANDARDS

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

Topics:

- 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 Length:
4 days

Course Format:
Classroom ILT
Virtual ILT



FEDERAL APPROPRIATIONS LAW

This course, which can vary in length to meet your organization's needs, 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:

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

Course Length:
1-5 days

Course Format:
Classroom ILT
Virtual ILT

FEDERAL BUDGETING FOR NON-BUDGETING PERSONNEL

This course provides individuals not directly involved in budgeting with a practical grasp of Federal financial and managerial systems essential for executing budgeting and accounting procedures. The course places a strong emphasis on harnessing the potential of these financial systems and processes to effectively fulfill the mission of the agency. Through active participation, attendees will gain insights into how the federal budget process can influence their specific roles, while also learning strategies to navigate these influences through strategic contingency planning. Participants will attain a comprehensive understanding, at a macro level, of the budget formulation process, as well as a keen awareness of the implications of the Government Performance and Results Act (GPRA). Additionally, attendees will become familiar with the primary phases and timelines inherent in the budget process and will master the application of appropriate methodologies to estimate costs related to staff salaries, benefits, travel, and contract expenses. This course serves as a valuable resource for individuals seeking to bridge the gap between their roles and the intricacies of budgeting in the federal context.

Topics:

- Overview of financial management processes
- Preparing, reviewing, presenting, and defending budget submissions
- Managing authorized funding through financial accounting and reporting systems
- Establishing measurable financial success criteria for programs and projects
- Foundational skills to successfully manage a project through its financial life cycle

Course Length:
3 days

Course Format:
Classroom ILT
Virtual ILT



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:

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

SUCCESSFUL BUDGET JUSTIFICATION AND PRESENTATION

This course provides a fundamental understanding of the federal budget process, and the roles, 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:

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

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



UNDERSTANDING AND PREPARING FEDERAL FINANCIAL STATEMENTS

Federal government leaders need reliable, useful, and timely financial and performance information to make sound decisions on the current results and future direction of vital federal programs and policies and to provide transparency that builds taxpayer confidence. Individuals responsible for preparing, reviewing, or auditing federal financial statements will benefit from this course that describes the relationship of financial statements to federal accounting standards and associated laws and regulations and outlines audit requirements for federal financial statements. Additionally, you will learn how to prepare basic financial statements, including the Statement of Budgetary Resources, in accordance with OMB and federal accounting standards.

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

Topics:

- Federal financial reporting and legislation
- Federal accounting and reporting, including the US standard general ledger (USSGL)
- Preparing basic federal financial statements
- Financial statement audits



FEDERAL GRANTS & FINANCIAL ASSISTANCE COURSES



ADVANCED COST PRINCIPLES FOR FEDERAL GRANTS AND 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 also be customized to meet organization-specific policies and procedures.

Topics:

- 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 Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

ADVANCED GRANTS MONITORING

The purpose of this course is to help you understand OMB 2 CFR 200 guidance and gain familiarity with a risk-based approach to performance monitoring and compliance. You will review 2 CFR 200 requirements for monitoring Non-Federal Entity (NFE) technical and financial performance on financial assistance instruments, while learning about techniques for assessing programmatic compliance, risk and appropriate controls and requirements for establishing and updating program monitoring plans.

Topics:

- Government-wide guidance concerning appropriate use of financial assistance and procurement
- When to use grants or cooperative agreements
- Source and applicability of legal and regulatory requirements covering financial assistance programs
- Basic concepts applicable to costs that are allowable, reasonable, and allocable
- Basic audit requirements for application to monitoring responsibilities

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



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. You 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:

- 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 Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

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. You will learn how to: identify audit requirements that impact federal assistance awards; understand the roles, responsibilities, and relationships of all those involved in audits; get 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:

- 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 Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



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. You will 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 also be customized to meet organization-specific policies and procedures.

Topics:

- 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

COST PRINCIPLES FOR FEDERAL GRANTS AND 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:

- 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 Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



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. With a focus 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 also be customized to address organization-specific policies and procedures.

Topics:

- 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 Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

ETHICS CONSIDERATIONS IN FEDERAL GRANTS AND FINANCIAL ASSISTANCE

Federal financial assistance programs pose some potential unique ethics situations. This course exposes you 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 also be customized to address organization-specific ethics considerations.

Topics:

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

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



FEDERAL FUNDS MANAGEMENT: EVALUATING RISK AND AUDITING PERFORMANCE

This course focuses 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 also be customized to address organization-specific policies.

Topics:

- 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 Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

FEDERAL GRANTS AND 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:

- 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 Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



FEDERAL GRANTS AND 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 also be customized to meet organization-specific policies and procedures.

Topics:

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

FEDERAL GRANTS UPDATES: WHAT IT MEANS FOR GRANTS ADMINISTRATORS

The federal grants landscape, with its myriad requirements, is constantly changing. This course provides grants professionals with insight into ongoing changes, as well as a preview of upcoming updates to federal grant requirements. This course enables a deeper awareness of the potential challenges grant-making organizations face. During this course, you will discuss the key principles, as well as real and potential effects, of 2 CFR 200 on administrative requirements, cost principles, and audit requirements for federal grants. You will also examine ongoing governmental initiatives (i.e., the CARES Act and American Rescue Plan) that impact grants in the future and identify resources for keeping up to date on current and upcoming changes affecting federal grants. This course is intended for anyone interested in keeping his or her grants management knowledge current.

Topics:

- Grants Management in 2019
- Introduction to the Uniform Guidance
- Uniform Guidance Subpart A-Acronyms and Definitions and Subpart B-General Provisions
- Uniform Guidance Subpart C-Pre-Federal Award Requirements and Contents of Federal Awards
- Uniform Guidance Subpart D-Post-Federal Award Requirements and Contents of Federal Awards
- Uniform Guidance Subpart E-Cost Principles
- Uniform Guidance Subpart F-Audits
- Key resources for staying current

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



INTRODUCTION TO FEDERAL GRANTS AND FINANCIAL ASSISTANCE

This course gives participants a foundation in the processes and applications of federal financial assistance. Through a combination of lectures, discussions, and practical exercises, you 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 and GAO case studies provide an opportunity for you to apply key concepts to your 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, and an overview of The Red Book (Principles of Federal Appropriation Law).

Topics:

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

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT

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. The target audience for this course includes 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:

- 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 Length:
1 day

Course Format:
Classroom ILT
Virtual ILT



NEGOTIATING FEDERAL FINANCIAL ASSISTANCE AGREEMENTS: REACHING FAIR CONSENSUS

This course helps you gain the skills to negotiate with Non-Federal Entities (awardees). We address the 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:

- 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/tribal governments, and hospitals

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

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:

- 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
- Domestic protection
- Patent rights

Course Length:
2 days

Course Format:
Classroom ILT
Virtual ILT



TIME AND EFFORT REPORTING FOR FEDERAL GRANTS AND FEDERAL FINANCIAL ASSISTANCE INSTRUMENTS

Salaries and wages typically make up a substantial portion of federal grant budgets, and missteps in this area lead to regular audit findings for federal grant recipients and sub-recipients. This course discusses the requirements around time and effort reporting and shares tips and best practices to avoid missteps in this area. In addition, the course covers different methods of documenting time and effort, what constitutes adequate documentation, and how to calculate the appropriate amount of time to charge.

Topics:

- Requirements from 2 CFR 200.430 related to time and effort reporting
- Tips and best practices to avoid time and effort reporting problems
- Appropriate time and effort documentation and how to calculate the amounts of allowable salaries and wages allowable on a grant
- 2 CFR 200 time and effort requirements

Course Length:
2 hours

Course Format:
Classroom ILT
Virtual ILT

UPDATES TO FEDERAL GRANTS GUIDANCE

This course provides an overview of the current grants guidance, then identifies recent updates in the grants management legislation, policies, and guidance. In addition to covering recent legislation and guidance, proposed changes to 2 CFR 200 are presented, to enable you to assess the potential impacts on the current financial assistance environment. Additionally, you gain familiarity with the other initiatives covering data management, System for Award Management (SAM) updates, and other current topics.

Topics:

- Introduction to Federal Grants Updates
- Recent legislation updates affecting grants management
- President's Management Agenda
- Recent OMB and DOE guidance
- Proposed 2 CFR 200 updates
- Other grants management initiatives

Course Length:
1 day

Course Format:
Classroom ILT
Virtual ILT

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