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Onsite Training Courses Catalog

Preparing professionals to be
strong and effective leaders in:

- Federal Acquisition Management
- Federal Government Contracting
- Program and Project Management
- Business Management



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American Graduate University

For nearly 50 years, Procurement Associates, Inc. has provided customized onsite training and professional development as part of American Graduate University's non-degree professional development course programs. During these 50 years, professionals from the military, civilian agencies and commercial organizations have benefited from the in-house classroom training.

Today, American Graduate University and Procurement Associates, Inc. remain committed to providing working professionals with high-value, high-quality professional training in the areas of acquisition, contract and program/project management as well as general business management. American Graduate University's programs offer working adults a convenient, content-rich approach in acquiring quality professional education and training at a reasonable cost.

AGU's Unique Learning Options

In these busy times, when working professionals must balance the demands and time pressures of work, family and educational requirements and goals, American Graduate University offers you a range of flexible, continuing-education options that fit your needs. These options allow you to take the professional development coursework you need to stay current on your job — and move ahead in your career — without having to disrupt your personal or professional life along the way.

The University offers individual training and professional development courses that are listed in this catalog on a customized schedule designed to meet each client organization's most critical training needs as described in the course outlines of this catalog.

Personal Classroom Learning Environment

Our onsite classroom training courses offer students a traditional learning experience where face-to-face interaction with the instructor and other students provide for lively discussions and in-depth exploration of topic areas of greatest interest to each participant.

Most courses are designed to be completed in three to five days of intensive instruction using a mix of learning approaches including practical experience from classroom exercises, case studies and question and answer discussions on the critical subject areas.



Continuing Education Credits

Successful completion of AGU graduate courses or training classes provides credits towards one or more of the following certifications (see individual course listings for details):

- National Contract Management Association credentials
- Project Management Institute credentials

Valuable Course Materials

Each attendee receives a comprehensive course manual or set of materials containing text, lecture notes, supplementary readings and cases. These full-text resources will be both a primary learning tool while in the classroom as well as an important reference in the future.

Bring AGU to YOU — and your staff — with... Customized Onsite Training Programs

An on-site training program customized to the unique learning and skill requirements of your organization can provide a cost effective solution while ensuring quality training. Hundreds of organizations have maximized their training and travel budgets by hosting in-house training for their staff. In addition, in-house classes give an organization a boost in performance since staff will be working from the same material at the same time.

Choose from the courses listed in this catalog or call our academic counselors at 1-877-351-9060 to discuss other popular offerings in the program or acquisition management fields.

Interested in earning a graduate degree?

AGU offers several accredited distance learning graduate degree programs, including Master of Acquisition Management (MAM), Master of Project Management (MPM), Master of Contract Management (MCM), Master of Business Management (MBA) offering a concentration in acquisition and contract management and another Master of Business Management (MBA) with a focused concentration in Program and Project Management. AGU also offers several Master's Certificate programs.

To learn more about applying to any of AGU master's degree programs, please call 1-877-351-9060 or visit our web site at www.agu.edu where you'll find complete course descriptions, prerequisites, online applications and other helpful information to help you decide if AGU is right for you as you seriously plan to earn a graduate degree as you continue to work in your field.

AGU AFFILIATE ORGANIZATIONS



Acquisition & Contract Management Courses



AS A BUYER LEARN HOW TO . . .

- Develop requirements and RFPs
- Select qualified vendors
- Manage contracts successfully

AS A SELLER LEARN HOW TO . . .

- Identify and pursue contract opportunities
- Prepare and price winning proposals
- Manage contracts and subcontracts

COURSE OVERVIEW

This was the first course on government contracting to be presented on a nationwide basis and has set the standard for education in the field of acquisition and contracting. It covers in one intensive, integrated program all aspects of Government contracting and subcontracting and related management challenges, from the development of the requirement to the final closeout of the contract. Since a complete understanding of the entire contracting process is essential for success in contracting, the course topics are covered in-depth from both the buyer's and seller's viewpoint. The course is completely current with laws, regulations and operating procedures.

Take home tools include detailed reference materials such as the Federal Government Contracting textbook, lecture notes and case studies, and miscellaneous handouts.

WHO SHOULD ATTEND THIS COURSE

Any person connected with any area of government contracts will benefit from this course. Participant titles may include, but are not limited to:

- Contract Managers & Administrators
- Contracting Officers & Contracting Specialists
- Cost/Price Analysts
- Program/Project Managers & Financial Managers
- Subcontract Managers
- Buyers & Purchasers
- Marketing & Proposal Managers

COURSE OUTLINE

The course is presented using a mix of learning approaches including practical experience from classroom exercises, case studies and discussion from these subjects:

I. The Contracting Process

- Acquisition Laws and Regulations
- Government vs. Commercial Contracting
- Acquisition Methods & Contract Types

II. Developing the Work Requirements

- Requirements Documents
- Developing the SOO/SOW
- The WBS and IMP/IMS
- Performance-Based Acquisition
- Developing the RFP

III. The Proposal

- Analysis of Requirements
- Proposal Preparation Process
- Written and Oral Proposal Formats

IV. Source Selection

- Evaluation Criteria & The Selection Process
- Determining Competitive Range
- Discussions/Negotiations
- Debriefings
- Bid Protests

V. Estimating, Pricing and Profit

- Elements of an Estimate
- Pricing Techniques
- Price/Cost Analysis
- Determining Profit or Fee
- Cost or Pricing Data

VI. Negotiating the Contract

- Planning & Conducting the Negotiation
- Organizing the Team
- Reaching a Win/Win Solution

VII. Terms and Conditions

- Financing Provisions
- Intellectual Property
- Quality
- Labor and Environmental
- Socio-Economic Provisions

VIII. Contract Management

- Contract Management Functions
- Contract Review & Interpretation
- Monitoring and Controlling the Work
- Changes and Modifications
- Program Management
- Subcontract Flowdowns

IX. Terminations, Disputes and Closeouts

- Termination for Default or Convenience
- Contract Disputes and Contract Appeals
- Contract Closeout

LEARN HOW TO . . .

- Use legal requirements to positively affect contract performance
- Minimize legal reviews – know what you can and can't do
- Protect your interests with key legal precedents
- Reduce the potential for claims and disputes upfront
- Avoid other legal entanglements

COURSE OVERVIEW

Understanding government contract law is the lynchpin to being an effective contract professional. Without this understanding you expose yourself and your organization to possible legal entanglements. This class takes you through the purpose, interpretation, applicability, legal and administrative ramifications of the clauses, statutes, executive orders and regulations applicable to government prime contracts and subcontracts. You get a primer in “preventive” contract law to help you avoid legal problems and handle them swiftly and effectively if they do arise. The major decisions of the Boards of Contract Appeals, the Comptroller General, and the Courts are examined. The rights and responsibilities of the government and the prime contractor, and the specific problems of the prime and subcontractor relationship are explained. The Federal Acquisition Regulation (FAR) and its relationship to the current agency regulations will be covered in detail.

Take home tools include the Government Contract Law reference book, lecture notes that expand on the text material and Contract Law Developments, Department of the Army.

WHO SHOULD ATTEND THIS COURSE

This course is designed for non-lawyers who need to know contract law to be successful. Participant titles may include but are not limited to:

- Contract Managers & Administrators
- Contracting Officers & Specialists
- Procurement/Purchasing Managers
- House Counsel
- Negotiators
- Subcontract Managers
- Government Marketing Managers
- Project Managers
- Proposal Managers

COURSE OUTLINE

This class uses a mix of learning approaches including practical experience from classroom exercises, case studies and discussion from these subjects:

I. Introduction to Government Contract Law

- Sources of Procurement Law
- Contract Principles
- Essential Elements of a Contract
- Ethics, Standards of Conduct

II. General Contract Principles and Authority

- Classification of Contracts
- Commercial vs. Government Authority
- Relevant Procurement Laws and Legislation

III. Contract Formation

- Competition Requirements
- Commercial Items
- Contract Instruments
- Contracting Methods
- Best Value Source Selection
- Bid Protests

IV. Funding and Financing of Contracts

- The Federal Budget Process
- Obligated, Revolving and Non-Appropriated Funds
- Financing Provisions
- Progress Payments
- Commercial Item Financing

V. Labor, Social, Economic and Environmental Considerations

- Relevant Legislation
- Legal Precedents for Enforcement
- Requirements for Compliance
- FAR, DFARS and Agency Regulations

VI. Key Contracting and Legal Issues

- Truth in Negotiations
- Intellectual Property
- Government Property
- Fraud and Legal Remedies
- Inspection, Acceptance & Warranties

VII. Changes and Contract Interpretation

- Rules of Interpretation
- Change Clauses
- Formal vs. Constructive
- Equitable Adjustments

VIII. Claims, Disputes and Terminations

- Contractor vs. Government Claims
- Disputes and Appeals Process
- Breach of Contract
- Default Terminations
- Convenience Terminations

Business Development and Proposal Preparation – 40th Year

A prerequisite to winning government contracts

Course #: 513

Three Days

LEARN HOW TO . . .

- Follow proven tips to improve your win ratio
- Use techniques to eliminate costly proposal errors
- Incorporate lessons learned from the real world
- Employ proposal approaches to outsell your competitors
- Implement a smarter process to build a winning offer

COURSE OVERVIEW

This course is the most complete, thoroughly documented, professional approach to preparing and winning government proposals. This class is taught by a faculty that combines expertise in proposal preparation and management of the proposal process. You get detailed step-by-step documented instruction on every aspect of the pre-proposal, proposal, source selection and contract definition process. Specific attention is paid to the strategic and tactical decisions made necessary by the use of “best value” contracting techniques. You will return to your organization with information and approaches you can put to use right away to boost your business.

Take home tools include the Proposal Preparation Manual covering every aspect of the process, course notes, examples and supplementary readings.

WHO SHOULD ATTEND THIS COURSE

All staff involved with business development, proposals and negotiations will benefit from this course. This course is specifically designed for but not limited to:

- Marketing/Sales Directors and Managers
- Proposal Managers
- Business Development Managers
- Proposal Team Members
- Negotiators
- Contract Managers
- Project/Program Managers

COURSE OUTLINE

This course uses a mix of learning approaches including structured presentation, classroom exercises, case studies and discussion.

I. Developing a Winning Marketing Strategy

- Understanding the Marketplace
- Organizing for Business Development
- Conducting Market Research and Intelligence
- Analyzing the Market
- Business Development Planning
- Techniques for Developing Business
- Relationship to Proposal Development

II. Solicitation and Source Selection

- Statements of Objectives
- Understanding the Statement of Work
- Analyzing the Request for Proposal
- The Source Selection Process
- What Does “Best Value” Mean?

III. Organizing for Proposal Preparation

- Proposal Development Organization
- The Proposal Manager
- The Proposal Team

IV. Proposal Preparation Procedures

- Bid/No Bid Process
- Planning the Proposal
- Budgeting and Scheduling
- Kickoffs and Reviews
- Managing the Effort

V. Building the Proposal

- Determining the Key Issues
- Developing Proposal Themes
- Modular Proposal Techniques
- Writing and Publishing the Proposal

VI. Proposal Formats

- Executive Summaries
- The Technical Volume
- The Management Volume
- The Past Performance Volume
- The Price/Cost Volume

VII. Proposal Evaluations

- Internal Evaluation of Proposals
- Oral Presentations
- Customer Visits
- Proposal Follow-Up

LEARN HOW TO . . .

- Implement effective financial techniques for contracting
- Work with government cost data requirements
- Understand the cost principles and cost accounting standards
- Use proper financial tools

COURSE OVERVIEW

Government contracting requires compliance with many financial requirements unique to the government – contractor – subcontractor environment. Government contractors, subcontractors and agencies must operate circumscribed by a complex set of regulations and procedures much different than those encountered in the commercial marketplace. This course is designed to give students a complete picture of the requirements for financial management in this environment, integrating financial and contracting processes and procedures into a unified whole. You'll learn about problems and approaches for effective financial management from both the customer's and contractor's viewpoint.

Take home tools include detailed reference material consisting of the Financial Management of Government Contracts textbook, and extensive presentation notes and visuals.

WHO SHOULD ATTEND THIS COURSE

Any professional involved in the pricing, accounting or management of government contracts will benefit from this course. Participant titles may include but are not limited to:

- Financial Managers & Comptrollers
- Pricing and Estimating Personnel
- Cost and Price Analysts
- Auditors & Negotiators
- Contract Managers and Administrators
- Contracting Officers
- Subcontract Managers
- Buyers and Purchasing Personnel

COURSE OUTLINE

This class uses a mix of lecture, discussion, and cases to cover the following subjects:

I. Financial Management Systems

- Elements of Finance
- Financial vs. Cost Accounting
- Government vs. Commercial Systems
- Financial Analysis Techniques
- Pricing vs. Estimating vs. Costing vs. Accounting

II. Effect of Type of Contract on Price and Cost

- Fixed Price & Cost Reimbursement
- Incentive
- Indefinite Quantity/Delivery
- Multiyear Procurement
- Time and Material
- Award Fee/Term

III. Cost or Pricing Data Requirements

- Truth in Negotiations Act (TINA)
- FAR Coverage & Exemptions
- Defining Cost or Pricing Data
- Defective Cost or Pricing Data
- Subcontractor Data
- Fraud and False Claims

IV. Cost Principles

- Factors Affecting Allowability
- Advance Agreements
- Analysis of Individual Cost Principles
- Securing Maximum Recovery

V. Cost Accounting Standards

- Requirements – Thresholds – Exemptions
- Disclosure Statements
- The Cost Accounting Standards

VI. Financing

- Government Budgeting
- Private Financing & Guaranteed Loans
- Progress Payments & Advance Payments
- Performance-Based Payments
- Milestone Billing & Commercial Items

VII. Service Contracts

- Service Contract Act
- Wage Determinations
- Indefinite Delivery/Indefinite Quantity
- Estimating, Pricing & Types of Costs
- Uncompensated Overtime

VIII. Financial Planning and Control

- Financial Plans & Controlling Resources
- Contract/Project Budget Baselines
- Performance Measurement
- Management Reserves and Undistributed Budgets
- Estimates at Completion
- Overruns vs. Growth
- Analysis and Control of Indirect Costs

*Companion Course: Pricing Government Contracts
(Course No. 518)*

LEARN HOW TO . . .

- Build credible, comprehensive estimates
- Price products and services for maximum effect
- Work with direct and indirect costs
- Price changes and terminations

COURSE OVERVIEW

When all the mystery is cleared away, pricing is the means of putting a dollar sign on goods and services. This course provides an understanding of the pricing techniques used in government contracting and subcontracting. The entire pricing process for new business, contract changes, and termination is explained in detail. This course is specifically designed to integrate the estimating, cost, pricing, and negotiating functions into a single unified whole. Learn about the specific problems and techniques applicable to the development, analysis, and justification of each major element of cost. Gain a strong working knowledge of pricing principles and tools from both the seller's and buyer's viewpoint.

Take home tools include a complete reference library consisting of the Pricing Government Contracts textbook, presentation notes, visuals and cases.

WHO SHOULD ATTEND THIS COURSE

Any professional involved in the pricing, accounting or management of government contracts will benefit from this course. Participant titles may include but are not limited to:

- Financial Managers & Comptrollers
- Pricing and Estimating Personnel
- Cost and Price Analysts
- Auditors & Negotiators
- Contract Managers and Administrators
- Contracting Officers
- Subcontract Managers
- Buyers and Purchasing Personnel

COURSE OUTLINE

This course uses a mix of learning approaches including lecture, exercises, case studies and discussion, and covers the following subjects:

I. Pricing Techniques and Strategies

- Steps in Pricing & Pricing Strategies
- Cost vs. Price
- Use of Cost Data in Pricing

II. Anatomy of a Cost Proposal

- Structure and Format
- Estimating Methodology & Accounting Practices
- Providing the Appropriate Cost Detail

III. Estimating Systems

- Steps & Techniques in Estimating
- Using the Work Breakdown Structure
- Estimating Components

IV. Direct Labor – Labor Rates – Use of Indices

- Categorizing Labor Rates & Forecasting Techniques
- Recurring vs. Non-Recurring
- Engineering, Manufacturing, and Services Labor

V. Material and Subcontracts

- Material and Subcontract Costs
- Make or Buy Decisions
- Estimating and Projecting Material Costs

VI. Other Direct Costs

- Types of Costs
- Estimating and Analysis

VII. Overhead Costs

- Structure of Indirect Cost Pools
- General and Administrative Costs
- Allocation Methods

VIII. Profit and Fee

- FAR Regulations
- Use of Weighted Guidelines
- Methods of Determining Profit

IX. Software Pricing

- Software Life Cycles
- Integration With Hardware Development
- Cost Estimating Methods

X. Price and Cost Analysis

- Price/Cost Analysis Techniques
- Using Price and Cost Data
- Risk & Cost Realism Analysis

XI. Pricing Changes and Modifications

- Formal vs. Constructive Changes
- Pricing Changes
- Delay & Disruption

XII. Pricing Termination Claims

- Fixed Price vs. Cost Contracts
- Settlement Expenses & Adjustments for Loss
- Profit and Fee

Companion Course: Financial Management of Government Contracts (Course No. 517)

LEARN HOW TO . . .

- Use price and cost analysis effectively
- Prepare and conduct a price analysis
- Analyze cost, fee and profit
- Develop techniques for negotiating and pricing contracts

COURSE OVERVIEW

This course provides an understanding of the concepts of price and cost analysis. It will sharpen and expand the skills of experienced practitioners and provide a solid base of knowledge and practical skills upon which less experienced personnel can build.

Price Analysis is a broad term which includes in its meaning whatever actions are taken by a buyer to reach a price decision without resorting to cost analysis. Cost Analysis consists of the detailed analysis of all or part of the individual components of a cost estimate in order to form an opinion on the degree to which a supplier's proposed costs represent what performance of the contract should cost, assuming reasonable economy and efficiency.

The course is designed for all personnel who conduct price and cost analysis, and those who use it. It includes the best in both commercial and government pricing practices. Attendance at this course will enable you to develop and improve skills in the latest practices and processes in price and cost analysis.

Take home tools include extensive course materials furnished for use in this course and for later reference, including notes, text and cases.

WHO SHOULD ATTEND THIS COURSE

Personnel who can benefit from this course include:

- Buyers
- Contracting Officers
- Price Analysts
- Cost Analysts
- Estimators
- Subcontract Managers
- Procurement Managers
- Other Contracting Specialists

COURSE OUTLINE

This class uses a mix of lecture, exercises, case studies and discussion to cover the following subjects:

I. Pricing and Cost Accounting Principles

- Cost Accounting Principles
- Cost Systems
- Types of Pricing
- Effect of Contract Type

II. Estimating

- Estimating Techniques
- Use of the WBS

III. Preparing for Price Analysis

- Reviewing Purchase Request and History
- Market Research
- Preliminary Estimates

IV. Price Analysis Techniques

- Adequate Price Competition
- Catalog or Market Pricing
- Comparison With Current or Past Prices
- Use of Price Indices
- Use of Price/Cost Performance Histories
- Comparison With an In-House Estimate
- Cost-Volume Relationships
- Use of Cost Estimating Relationships
- Accounting for Price Differences

V. Overview of Cost Analysis

- WBS – SOW – Contract Line Item Matrix
- Nonrecurring – Recurring Costs
- Make or Buy Plan
- Cost Drivers

VI. Analysis of Direct Costs

- Engineering Labor
- Manufacturing Labor
- Material and Subcontracts
- Services
- Other Direct Costs

VII. Analysis of Labor Rates

- Forecasting Techniques
- Direct Estimating
- Historical Rates
- Union Agreements

VIII. Analysis of Indirect Costs

- Definition of Indirect Costs and Pools
- Projection Techniques for Indirect Labor
- Allocation Techniques
- Forward Pricing Rate Agreements

IX. Analysis of Software Costs

- Software Process Models
- Development of the Cost Data Base
- Cost Estimating Methods

X. Analysis of Profit-Fee

- Structured Guidelines Factors
- Cost-Plus-Award Fee Contracts
- Facilities Capital Cost of Money

XI. Price/Cost Analysis and Negotiation

- Establishing Price Objectives
- Use of Discussions/Negotiation
- Documenting the Cost/Price Analysis

XII. Unique Government Costing Requirements

- Cost and Pricing Data Requirements
- Cost Principles
- Cost Accounting Standards

LEARN HOW TO . . .

- Maximize successful contract performance
- Ensure full contract compliance
- Build solid government-industry partnerships
- Avoid common pitfalls and penalties
- Identify and effectively manage change

COURSE OVERVIEW

This course covers the organization, management techniques and areas of application of the contract management/contract administration function. It is designed to provide attendees with the knowledge and the skills essential to effective business relations between buyer and seller. It provides a comprehensive approach to the interrelationships between contract management, the various functional disciplines and project management. Contract management and administration requires an in-depth knowledge of contract law, regulations and procedures and the ability to use that knowledge to avoid problems during contract performance and to solve them if they occur. The course stresses the positive management contribution that contract management skills can make to the organization.

The emphasis in the course is on the responsibilities and rights of both buyers and sellers in the Government acquisition environment. The emphasis on the responsibilities is to ensure that pre-contract and post-contract award activities are conducted within the letter and the spirit of the applicable laws and regulations.

Take home tools include a complete study and reference package, including the text Federal Acquisition and Contract Management, lecture notes and cases.

WHO SHOULD ATTEND THIS COURSE

Any staff member who is associated with the management and administration of government contracts within both government and industry environments will benefit from this course. Participant titles may include:

- Contract Managers & Administrators
- Contracting Officers & Specialists
- Buyers
- Negotiators
- Government Sales/Marketing Managers
- Project/Program Managers
- Proposal Managers

COURSE OUTLINE

This class uses a mix of learning approaches including structured presentations, exercises, case studies and discussion.

I. The Contracting Process

- Government vs. Commercial Contracting
- Contracting Methods
- Contract Types
- The Contract Management Function
- Organizing for Contract Management

II. Contract Planning and Award

- Acquisition Strategy
- Contract Planning
- Request for Proposals and Source Selection
- Getting on Contract

III. Proposal and Pricing Process

- Pre-proposal Planning
- Proposal Development
- Pricing and Negotiation

IV. Contract Performance

- Contract Review and Execution
- Control of Customer/Contractor Interfaces
- Funding, Finance and Payment
- Measuring Contract Performance
- Disputes and Remedies

V. Contract Changes and Modifications

- Rules of Interpretation
- The Changes Clauses
- Constructive Changes
- Pricing a Change
- Managing Contract Changes

VI. Contract Management Issues

- Program Management Interface
- Control of Subcontracts
- Quality Assurance
- Intellectual Property
- Customer Property

VII. Terminations and Closeout

- Convenience Terminations
- Default Terminations
- The Closeout Plan
- Completing Contract Requirements
- Final Closeout and Payment

LEARN HOW TO . . .

- Do organizational and work analysis
- Develop performance measures
- Format SOOs and SOWs
- Write clear requirements and quality plans

COURSE OVERVIEW

The Performance Work Statement (PWS) is a key element in the acquisition process. Development of the PWS should start as early as practicable. The PWS serves as the basis for the seller's response, proposal evaluation, and source selection. If a statement of objectives (SOO) is used in the RFP, the seller must develop the PWS as part of its proposal response and the negotiation of the final contract. PWS is key to the success of the contract effort. No subject is more important than how to organize, compose, and otherwise prepare the segment of the contract or project plan that describes the work to be done. Various described as "Performance Work Statement," "Statement of Work," "Work Scope," "Technical Requirement," and "System Description," this document has, at times, assumed proportions of enormous complexity and seemingly unlimited diversity. The PWS is the heart of the contract or project. Everything else revolves around it or is affected by it and depends upon it. Problems throughout the acquisition process are often traceable to its language, approach, terminology, and content.

This course will cover in detail the role of the PWS and the steps in preparing a quality performance work statement, with emphasis on the use of performance measures.

Take home tools include presentation visuals, manuals, exercises, checklists and examples.

WHO SHOULD ATTEND THIS COURSE

All personnel who will work on developing performance work statements can benefit from this course, including:

- Contracting Personnel
- Technical Personnel
- Program Managers
- Subcontract/Procurement Managers

COURSE OUTLINE

The course will be conducted using structured presentations, discussion and exercises. Each attendee will receive a course manual containing visuals, text, readings, sample PWS formats and exercises.

I. Performance-Based Acquisition

- Background
- Basic Elements and Concepts
- Seven Steps to Performance-Based Service Acquisitions

II. The Statement of Work

- SOW vs. PWS vs. SOO
- SOW Types – Performance/Detailed/Level of Effort
- SOW Relationship to RFP/WBS/Specs/Contract
- Specific Relationship to RFP Sections L and M

III. Steps in PWS Development

- Organizational Analysis
- Work Analysis
- Performance Analysis and Standards
- Activity Analysis
- Data Gathering
- Cost Analysis
- Developing Incentives

IV. Performance Analysis

- Steps in Performance Analysis
- Developing or Choosing Performance Measures
- Performance Standards
- Acceptable Quality Levels
- Performance Requirements Summary
- Performance Measures – Examples

V. Performance Work Statements – Formats

- Scope
- Applicable Documents and Definitions
- Customer Furnished Property/Facilities
- Contractor Furnished Items
- Requirements
- Data
- Technical Exhibits

VI. Writing the PWS

- Organizing the PWS
- Watch Your Language!
- Mandatory Language
- Stating Requirements or Goals
- Avoiding Ambiguity
- Work Words and Product Words

VII. The Statement of Objectives (SOO)

- SOO Content
- Relationship to Other Documents
- Contractor's Response to SOO
- SOO Examples

VIII. Quality Assurance Plan (QAP)

- Elements of a QAP
- Surveillance Methods
- Using Incentives
- QAP Examples

IX. PWS Exercises

- Reviewing a PWS
- Developing a PWS
- Developing a SOO

LEARN HOW TO . . .

- Use performance-based contracting techniques
- Select the appropriate contract type
- Write a performance work statement and quality assurance plan
- Prepare a winning proposal
- Select the right vendor
- Administer a service contract
- Measure performance

COURSE OVERVIEW

Service contracting is the fastest growing area of government procurement. The types of services acquired by contract range from routine maintenance and security services to contracts for basic research, applied engineering, environmental restoration, and information systems. Service contracts, as distinguished from contracts and subcontracts for supplies, are designed to be used by industry organizations or government agencies to acquire knowledge and skills that are not available to them or that can be acquired at a lesser cost from outside suppliers.

The course integrates all of the acquisition, pricing, performance, legal and administration aspects of service contracts from both the buyer's and the seller's perspective. The course also addresses the laws, regulations, directives, policies and management procedures applicable to all types of service contracts.

Take home tools include a complete course manual, containing text, notes, cases and exercises.

WHO SHOULD ATTEND THIS COURSE

Anyone involved in the marketing, pricing, administration or management of service contracts can benefit from attendance, including:

- Acquisition Planners
- Buyers
- Contracting Officers
- Technical Representatives
- Contract Administrators
- Attorneys
- Estimators
- Price and Cost Analysts
- Program Managers
- Negotiators

COURSE OUTLINE

The course is conducted using structured presentation, cases and exercises. Subjects covered include:

I. Service Contracting

- Service Contracting Process
- Laws, Regulations and Rules
- Acquisition Methods
- Performance-Based Contracting
- Contract Types

II. Defining Performance Requirements

- Requirements Analysis
- Organizational and Work Analysis
- Performance Standards
- Levels of Performance
- Developing a Good Performance Work Statement

III. Contract Formation

- Acquisition Planning
- Preparing the RFP, SOO, and SOW
- Planning and Building a Winning Proposal
- Pricing and Negotiating the Service Contract
- Selecting a Source

IV. Contract Management

- Contract Review and Execution
- Using Task Orders
- Controlling Performance
- Administering Subcontracts
- Financing and Payment

V. Contracting Officer's Representatives

- Responsibilities of COR/COTR
- Reviewing and Reporting on Performance
- Contractor/Government Interfaces

VI. Contract Changes and Modifications

- Analysis of Changes Clauses
- Change vs. Technical Direction
- Pricing and Negotiating Changes
- Handling Terminations – Convenience and Default

VII. Issues in Service Contracting

- Breakout vs. Bundling
- Technical vs. Cost Tradeoffs
- Past Performance
- Conflicts of Interest
- Personnel and Workload Problems
- Uncompensated Overtime
- Teaming vs. Joint Ventures

LEARN HOW TO . . .

- Understand why and when you negotiate
- Develop a strong negotiation team
- Choose strategies and tactics that work
- Negotiate and what to negotiate
- Conduct a successful contract or subcontract negotiation

COURSE OVERVIEW

To be successful in the contracting and procurement processes requires that buyers and sellers know both how to negotiate and what to negotiate. Pre-award and post-award negotiations include work scope, cost and price, terms and conditions, and contract changes. Negotiation occurs almost every business day and is vital to capturing and performing a successful contract or subcontract.

This course provides a time proven approach to the knowledge, attitude and skills required for successful contract negotiations. The emphasis is on the whole negotiation process – the how and what of negotiation – not on a series of unrelated tactics and techniques. The course includes dynamic exercises to give both experienced and inexperienced negotiators a complete conceptual framework to build on. You leave this course armed with the knowledge to be a more effective, seasoned negotiator.

Take home tools include a complete set of negotiation reference materials: (1) "Negotiation of Contracts," 20 chapters, 300 pages, AGU Press; (2) Lecture Notes and Visuals, 200 pages; (3) "Federal Contract Negotiation Techniques," DAU Press; and (4) Case Studies in Negotiation.

WHO SHOULD ATTEND THIS COURSE

Since negotiation is used to resolve differences and conflicts of interest both inside and outside the company or agency, this course is applicable to personnel at every level. "Contract Negotiation Techniques" is specifically designed for, but not limited to:

- Contract Managers & Administrators
- Marketing Managers
- Purchasing and Procurement Managers
- Contracting Officers and Specialists
- Buyers
- Proposal Managers
- Finance and Pricing Personnel
- Attorneys
- Project and Program Managers

COURSE OUTLINE

The class is presented using a mix of lecture, discussion, exercises, practice negotiation sessions, and team evaluations, to provide a complete understanding of both the principles and practices of contract negotiation, including the ability to plan a negotiation and to implement the plan with the proper strategy, tactics and techniques. Subjects covered include:

I. Why Negotiate?

- Nature of Negotiation
- When to Negotiate
- What to Negotiate
- Competition vs. Negotiation
- The Negotiation Process

II. Negotiation in Contracting and Procurement

- Using Negotiation in Buying and Selling
- Identifying Needed Information
- Exchanges Prior to Negotiation
- Steps in Competitive Discussions
- Noncompetitive Negotiations

III. Human Values and Negotiation

- Psychology of Individuals and Groups
- How Values and Attitudes Affect Outcomes
- Honesty and Trust in Negotiation
- Dealing With Different Behaviors
- Attributes of a Good Negotiator

IV. Communication and Negotiation

- The Communication Process in Negotiation
- Breaking Down Communication Barriers
- Verbal and Nonverbal Techniques
- Affects of the Physical Environment

V. Preparation for Negotiation

- Tailoring the Negotiation Team
- Developing Negotiation Issues and Objectives
- Identifying the Other Side's Possible Approaches
- Determining Ranges of Agreement
- The Negotiation Plan

VI. Contract Negotiation Issues

- Identifying the Contract Type Risks
- Negotiating the Statement of Work
- Analyzing and Discussing Costs and Price
- Negotiating the Critical Terms and Conditions
- Contract Change Negotiations

VII. Strategy, Tactics and Techniques

- Picking a Strategy
- Determining Bargaining Strengths and Weaknesses
- Using Tactics That Work
- Dealing With All the Techniques
- Concessions vs. Commitments

VIII. Conducting the Negotiation

- Plan it First
- Find Out the Facts
- Negotiate to Reach an Agreement
- Bargain If You Have To!
- Document Always

LEARN HOW TO . . .

- Develop the subcontract team
- Build the SOW and RFP
- Organize teaming and partnering arrangements
- Price and negotiate the subcontract
- Manage and administer subcontracts for customer satisfaction

COURSE OVERVIEW

Subcontracting is key to the success of most prime contracts since fifty to eighty percent of prime contract dollars may be expended under subcontracts and complex purchase orders. Today's complex contracting environment requires a complete understanding of advanced subcontracting techniques, teaming arrangements, and partnering agreements. This course provides a complete overview of the subcontracting process from the inception of the procurement request to the closeout of the subcontract. The course covers all aspects of the process necessary to place, manage and perform subcontracts to meet quality, cost and time requirements. You will get a detailed framework of knowledge of the subcontracting techniques so that past, present and future experience can be integrated into successful subcontract management practices.

Take home tools include "Subcontract Management," two volumes, 1,500 pages. This complete reference package includes textbook, presentation notes, and cases.

WHO SHOULD ATTEND THIS COURSE

The success of a prime contractor is dependent on placing and managing subcontractors. Any personnel who get involved in government contracts will benefit from this class. This class is specifically designed for, but not limited to:

- Subcontract Managers
- Buyers and Procurement Managers
- Subcontract Administrators
- Subcontract Personnel
- Cost/Price Analysts
- Program/Project Managers

COURSE OUTLINE

This class systematically covers the knowledge and skills required by a professional subcontract management team using a mix of structured presentation, exercises and discussion. Subjects covered include:

I. Introduction to Subcontracting

- The Buying Process
- Supply Management and Subcontract Management
- Forming the Subcontract Team
- Make or Buy Decisions

II. Laws and Regulations Governing Subcontracts

- Statutes and Acquisition Regulations
- Government vs. Commercial Contract Practices
- Uniform Commercial Code
- Flowdown Requirements

III. Methods of Procurement

- Competition Requirements
- Sole Source Acquisitions
- Competitive Proposals and Negotiations

IV. Subcontracting Plans

- When Plans Are Needed
- Types and Formats
- Preaward/Postaward Procedures

V. Teaming and Partnering

- Developing the Teaming Agreement
- Issues and Problems in Teaming
- Partnering – Basic Tenets

VI. The Statement of Work

- Types of SOWs – Performance, Detailed, Level of Effort
- Relationship of SOW to WBS
- SOW Preparation and Steps
- Writing and Reviewing the SOW

VII. Requests for Proposals

- RFP Formats and Composition
- Key RFP Sections
- Correlation of RFP Elements

VIII. Selection for Award

- Source Selection Plan
- Evaluation Criteria and Standards
- Scoring/Rating Proposals
- Evaluation of Proposals
- The Selection Decision

IX. Pricing and Costing

- Estimating and Pricing
- Profit and Fee
- Cost or Pricing Data and Analysis
- Negotiating the Subcontract

X. Subcontract Management

- Subcontract Preparation, Review and Execution
- Subcontract Program Management
- Administering the Subcontract
- Key Terms and Conditions
- Changes and Modifications
- Terminations, Convenience and Default

LEARN HOW TO . . .

- Develop adequate cost accounting and estimating systems
- Use the cost principles
- Comply with cost data requirements
- Employ cost accounting standards for better financial performance
- Minimize changes in accounting practices

COURSE OVERVIEW

This course explains all aspects of cost accounting requirements for government contracts and will help you to ensure adequate cost reimbursement and profit, and minimize the serious pitfalls and penalties for noncompliance with existing regulations. You'll learn about the requirements for acceptable accounting and estimating systems, procedures for satisfying cost or pricing data requirements, and gain a thorough understanding of the rules and regulations concerning the allowability, reasonableness and allocation of costs. A thorough understanding of the rules, regulations, and procedures associated with the Cost Accounting Standards is provided.

Take home tools include a copy of the Cost Accounting for Government Contracts manual, consisting of lecture notes, text, case studies, exercises and models, plus copies of pertinent government publications on Cost Principles and Cost Accounting Standards.

WHO SHOULD ATTEND THIS COURSE

This course is designed for all personnel involved in the pricing and financial aspects of government contracts. Participant titles may include, but are not limited to:

- Financial Managers & Accounting Personnel
- Estimators & Cost/Price Analysts
- Contract Administrators
- Contracting Officers and Specialists
- Subcontracting and Procurement Personnel

COURSE OUTLINE

This class uses a mix of learning approaches including lecture, exercises, case studies and discussion from these subjects:

I. Nature of Cost Accounting

- Elements of an Accounting System
- Classification of Costs
- Industry vs. Government Accounting Systems

II. Government Organization for Pricing and Costing

- Contracting Officer Responsibilities
- Administration and Settlement of Contracts
- Contract Auditor Responsibilities

III. Requirements for Accounting Systems

- Accounting System Requirements
- Pre- and Post-Award System Reviews
- Financial Responsibility Reviews

IV. Requirements for Estimating Systems

- Control and Review of Estimates
- Estimating System Reviews
- Deficiencies and Vulnerabilities

V. Cost or Pricing Data Requirements

- Truth in Negotiations Act
- FAR Coverage and Exemptions
- Submitting and Certifying & Preventing Defective Data

VI. The Cost Principles

- FAR Coverage
- Allowability – Reasonableness – Allocability
- Analysis of Individual Cost Principles

VII. Cost Accounting Standards

- Statutes and Regulations
- Cost Accounting Standards Board
- Types of Coverage
- Cost Accounting Standards Clause

VIII. Disclosure Statement

- Requirements & Contents of Disclosure Statement
- Filing and Amending

IX. Analysis of Cost Accounting Standards

- Organization and Applicability
- General Standards, Direct-Indirect Cost Standards
- Cost of Money Standards
- Compensation – Pension – Insurance – Depreciation Standards

X. Compliance – Cost Impact – Price Adjustments

- Contract Requirements
- Disclosed vs. Established Practices
- What Constitutes a Change?
- Submitting Cost Impact Proposals – Making Price Adjustments

XI. Indirect Costs

- Structure of Indirect Costs and Pools
- Projecting and Recovering Indirect Costs
- Forward Pricing Rates
- Negotiating Final Rates

XII. Indirect Cost Analysis and Control

- Indirect Cost Management Systems
- Controlling Indirect Costs
- Monitoring Contractor's Costs

LEARN HOW TO . . .

- State clear requirements and objectives
- Write definitive statements of work
- Complete quality requests for proposals
- Develop evaluation methods and factors
- Conduct proposal evaluations
- Award best value contracts

COURSE OVERVIEW

Acquisition reform and streamlining is changing the way the government and industry conduct business. There are many new factors to consider in contracting by negotiation, source selection and contract pricing. This class covers: performance-based contracting; the use of statements of objectives and contractor-developed statements of work; the use of oral presentations; more flexible source selection approaches for the government; past performance evaluation; and risk identification and mitigation. This is a completely integrated, well documented course covering the rationale, methods and techniques involved, from the development of requirements to final source selection, negotiation and contract award.

Attendees work with examples of performance requirements and specifications, statements of work, evaluation factors and weights, past performance, risk analysis, cost realism and the use of best value discriminators in making a selection decision.

Take home tools include detailed reference materials, including notes, visuals, examples – manuals which can be used immediately to improve your organization’s contracting efforts.

WHO SHOULD ATTEND THIS COURSE

This course is designed for both government and industry contracting personnel, including:

- Contracting Officers
- Program/Project Managers
- Procurement Managers
- Purchasing Executives
- Technical Personnel
- Subcontract Managers
- Buyers
- Source Selection Team Members

COURSE OUTLINE

This class covers the practices and procedures, from both government and industry, required to conduct effective source selection. Topics covered include:

I. Overview of the Process

- The Contract Award Process
- “Best Value” vs. Lowest Price, Technically Acceptable

II. Development of Requirements, Acquisitions, Strategy and Plans

- Requirement Elicitation and Management
- Market Research
- Acquisition Strategy and Plans

III. The Statement of Objectives

- SOO Content and Examples
- Relationship to Other Documents

IV. The Statement of Work

- Performance-Based SOW – Format and Content
- Relationship to Work Breakdown Structure and Specifications
- Preparing and Writing the SOW

V. Requests for Proposals

- Keys to Developing an RFP
- Developing the Solicitation
- Integrating the RFP Sections
- Draft RFPs, RFP Reviews and Murder Boards

VI. Organizing for Source Selection

- Normal vs. Major Source Selection
- Organizing for the Acquisition
- The Source Selection Plan
- Writing Good Evaluation Factors and Standards
- “Shredding Out” Into Factors, Subfactors and Elements

VII. The Evaluation Process

- Proposal Scoring/Ranking Systems
- Capability Evaluations
- Identifying Deficiencies and Risk Determinations

VIII. Technical/Business Evaluations

- Checklist for Evaluators
- Performance-Based Technical Approaches, Trade-Offs and Risk Assessments
- Evaluating the Management Approach

IX. Past Performance Evaluation

- Statutory and Regulatory Requirements
- Sources Information
- The Performance Risk Volume
- Evaluating and Weighting Past Performance

X. Cost to the Customer Determination

- Evaluation of Cost and Independent Cost Estimates
- Requirements for Cost or Pricing Data
- Cost/Price Analysis
- Cost Realism Audit
- Should Cost/Could Cost

XI. The Selection Process

- Awards Without Discussions
- Clarifications and Communications
- Determining the Competitive Range
- Discussions, Revisions and Selection
- Contract Negotiation and Definitization

XII. Debriefings and Protests

- Conducting Effective Debriefings
- Preaward/Postaward Protests

LEARN HOW TO . . .

- Know the contracting rules and regulations
- Work with the contracting process
- Utilize the bidding and proposal processes
- Manage contracts for value and return
- Keep the contract baseline current and dispute free

COURSE OVERVIEW

Basics of Government Contracting is designed to provide an understanding of the government contracting process. It gives attendees an appreciation of the basics required to successfully plan, bid, award and administer contracts. The course covers proven processes for meeting quality, cost and schedule requirements in the complex world of Government contracting and subcontracting.

Attendees will gain: a broad understanding of the contracting process; familiarization with the management problems associated with various types of contracts; an update on new and revised laws and regulations and management procedures; and training in the various types of skills needed for the anticipation, identification and solution of contract problems, together with the use of effective communication and documentation techniques. The course curriculum is covered in-depth from both the customer's and contractor's viewpoint. It is based on the Government's acquisition regulations, the administrative procedures used to implement them, and extensive experience with the management practices in industry.

Take home tools include detailed reference materials, including presentation notes, visuals and text.

WHO SHOULD ATTEND THIS COURSE

Since the course presents the fundamental processes and techniques for success in government contracting, any person connected with any area of government contracts can benefit from attendance, including:

- Contract Managers and Administrators
- Contracting Officers
- Contracting Specialists
- Program/Project Managers
- Financial Managers
- Subcontract Managers
- Buyers
- Purchasing, Marketing, Proposal and Operation Managers

COURSE OUTLINE

This course is presented using a combination of structured presentation, discussion and cases.

I. Elements of a Contract

- Requirements of a Valid Contract
- Authority of the Government to Contract

II. Laws, Regulations and Roles

- Public Laws
- Uniform Commercial Code (UCC)
- Federal Acquisition Regulation and Supplements

III. Methods of Contracting

- Sealed Bidding vs. Competitive Proposals
- Simplified Acquisition Procedures
- Commercial Items Contracting

IV. Types of Contracts

- Fixed Price vs. Cost Type
- IDIQ, T&M, Other Types

V. The Customer's Solicitation

- SOO or SOW
- Performance Requirements Document
- Request for Proposal

VI. Bidding and Proposal Processes

- Proposal Development
- Written vs. Oral Proposals

VII. Source Selection Techniques

- Source Selection Approaches
- Competitive Range, Exchanges and Revisions
- Low Price or Best Value Awards
- Debriefings and Bid Protests

VIII. Cost, Price, Financing and Payment

- Estimating and Pricing Concepts
- Cost or Pricing Data
- Price/Cost Analysis
- Cost Principles/Cost Accounting Standards
- Payment

IX. Negotiating the Contract

- What You Negotiate
- The Negotiation Process
- Documenting the Negotiation

X. Managing the Contract

- Contract Preparation, Review and Execution
- Contract Management Roles
- Controlling the Customer/Contractor Interface
- Reporting and Documentation
- Subcontract Management

XI. Primary Terms and Conditions

- The Primary FAR Clauses
- Supplemental Provisions and Clauses
- Flow-Down Requirements

XII. Contract Changes and Modifications

- Formal vs. Constructive Changes
- Analysis of the Changes Clauses
- Control of Changes
- Delays, Suspension of Work
- The Equitable Adjustment

XIII. Contract Completion, Closeout or Termination

- Customer/Contractor Closeout Actions
- Termination for Default
- Termination for Convenience



Project & Program Management Courses



LEARN HOW TO . . .

- Meet or exceed your program objectives
- Maximize customer satisfaction
- Integrate business and technical management processes
- Increase efficiency with performance metrics
- Lead and communicate for maximum results
- Use various organizational, business and technical tools for successful program management

COURSE OVERVIEW

This course is the most comprehensive and thoroughly documented five-day course in program management available from any private, public or government source. The course provides a complete framework of the program management process based on both industry and government procedures and processes in the management of complex programs.

The course illustrates how organizational structures and specific business and technical management systems are integrated into a total system of management to meet or exceed performance, cost, and schedule objectives and to maximize customer satisfaction.

Take home tools include a two-volume Program Manager's Handbook containing a complete textbook on program/project management, lecture notes, supplementary readings and cases, along with relevant government directives and standards.

WHO SHOULD ATTEND THIS COURSE

All industry staff members involved in any aspect of project/program management will benefit from this course. Participant titles include:

- Program and Project Managers
- Functional Personnel
- Program Team Members
- Senior Executives
- Engineers/Technical Managers
- Operations Managers
- Financial Managers
- Control Account Managers
- Contract Managers
- Subcontract Managers

PMBOK Coverage Areas

- | | |
|--------------------------|-----------------------------|
| • Integration Management | • Human Resource Management |
| • Scope Management | • Communications Management |
| • Time Management | • Risk Management |
| • Cost Management | • Procurement Management |
| • Quality Management | |

COURSE OUTLINE

This class uses a mix of learning approaches including classroom exercises, case studies, discussions and structured presentation.

I. Program Management Principles

- Program vs. Project Management
- Program Life Cycles
- Role of the Program Manager
- Functions and Tools of Program Management

II. Program Organizations

- Organizational Types
- Composition of a Program Team
- The Program Management Office
- Developing a Program Strategy
- Portfolio Management

III. Business Development and Proposal Preparation

- Market Research and Planning
- Relationship of SOW, Plans, Schedule & Specifications
- Development of the Proposal
- Proposal Formats

IV. Contract Award and Management

- Methods of Contracting
- Types of Contracts
- Contract Management
- Changes and Terminations

V. Work Definition, Planning and Budgeting

- Program Planning Steps
- Requirements Development
- Use of Work Breakdown Structures
- Scheduling Techniques
- Forming Program Budgets
- The Program Baseline

VI. Program Control and Administration

- Work Authorization Process
- Program Control Systems
- Earned Value Approach
- Program Reviews
- Statusing the Program

VII. System Development

- Product Development Process
- Technical Management Plan
- Systems Engineering
- Risk Analysis and Management
- Use of Technical Performance Measurements (TPM)

VIII. Technical Management

- Configuration/Data Management
- Managing Test and Evaluation
- Integrating Technical Specialties
- Production Management
- Logistics

IX. Quality Management

- Quality Principles and Drivers
- Quality Processes vs. Results

X. Leadership and Management

- Styles and Qualities
- Communication Systems
- Conflict and Negotiation

LEARN HOW TO . . .

- Employ proven techniques to effectively manage and lead programs in government ... not just monitor them
- Plan and control program life-cycles from concept to close out
- Use earned value techniques to ensure deliverables
- Mitigate risks of cost and schedule overruns

COURSE OVERVIEW

System/Program/Project/Product Management is one of the most complex, demanding management concepts in existence. This course provides a comprehensive knowledge of program/project management in the government environment. The course explains how the various organizational, business and technical tools can be integrated with the evolving acquisition approaches into a total program management system. It is designed to teach you to manage programs, not just monitor them. The course is a concentrated course covering all aspects of the subject matter from the inception of the requirement through the research, development or acquisition, production, and the operation and support of the product. It is supported by extensive reference material from both government and industry sources. The course material is in accord with all current government regulations, directives and practices.

Take home tools include a two-volume Government Program Manager's Handbook containing a textbook on program/project management, lecture notes, supplementary readings and cases, and relevant government directives and standards.

WHO SHOULD ATTEND THIS COURSE

This course is restricted to government civilian and military personnel who are presently (or may be) assigned as program/project managers or to key positions in a project office, as product/process team members, and as functional managers and users' representatives who must interface with project personnel. Participant titles may include:

- Program and Project Managers
- Program Executive Officers and Staff
- Functional Managers
- Product Team Members
- Senior Executives
- Engineers/Technical Personnel
- Operational Personnel
- Financial Managers

PMBOK Coverage Areas

- | | |
|--------------------------|-----------------------------|
| • Integration Management | • Human Resource Management |
| • Scope Management | • Communications Management |
| • Time Management | • Risk Management |
| • Cost Management | • Procurement Management |
| • Quality Management | |

COURSE OUTLINE

This course helps you substantially improve your management capabilities in the shortest possible time and is more comprehensive and thorough than much larger government courses. Subjects covered include:

I. Program Management Principles

- Program Management in the Government Environment
- Life Cycles
- Role of the Program Manager
- Functions and Tools of Program Management

II. Program Organizations

- Organizational Types
- Composition of a Program Team
- The Program Management Office
- Developing a Program Strategy

III. Acquisition Management Procedures

- Requirements Definition
- Planning and Budgeting
- Developing an Acquisition Strategy
- Program Definition
- SOO/SOW Development

IV. Contract Award and Management

- Laws and Regulations
- Methods of Contracting
- Types of Contracts
- Contract Management and Performance Factors
- Changes and Terminations

V. Definition, Planning and Budgeting

- Program Planning
- Use of Work Breakdown Structures
- Scheduling Techniques
- Forming Program Budgets
- The Program Baseline

VI. Program Control System

- Work Authorization Process
- Earned Value Management Systems
- Program Control Systems
- Program Reviews
- Information System Requirements

VII. System Development

- Product Development Process
- Technical Management Plan
- Systems Engineering
- Risk Analysis and Management
- Technical Performance Measurement

VIII. Technical Management

- Configuration/Data Management
- Managing Test and Evaluation
- Production Planning
- Transitioning to Production
- Logistics

IX. Quality Management

- Quality Principles and Drivers
- Quality Processes vs. Results

X. Leadership and Management

- Styles and Qualities
- Communication Systems
- Conflict and Negotiation

LEARN HOW TO . . .

- Organize a project team
- Plan a project
- Determine requirements and scope
- Use a WBS
- Schedule, estimate and budget a project
- Control a project
- Develop objective measures of performance
- Use risk analysis
- Build and maintain a project baseline
- Monitor and control project work
- Lead and manage the project

COURSE OVERVIEW

Projects develop the capabilities that are the foundation of an organization's success. Project management is the key to building that foundation. Project management is the process where a single manager/leader is responsible for building a project team to accomplish the project's objectives on schedule, within budget, and to the customer's satisfaction. It is the integrated management of a specific project carried out in a systematic way. Management of projects and larger programs consisting of a number of projects is a complex and demanding management concept. The project manager's task is complicated and diverse. The project manager is responsible for building into a cohesive whole the business, technical and human elements of his or her internal organization, the organization's team members, suppliers and the customer. This time-tested course provides a comprehensive knowledge of project management. It includes in-depth coverage on project management, life-cycles, organizations, stakeholders, and the key business and technical management procedures and human skills necessary to successfully manage any size project.

Take home tools include a Project Manager's Handbook including a complete textbook on project management, presentation notes and visuals, supplementary readings and case studies — a complete reference for later study and use.

WHO SHOULD ATTEND THIS COURSE

Any individual who is involved in any aspect of project management will benefit from this course, including:

- Project Managers
- Program Managers
- Product Team Leaders
- Technical Personnel
- Functional Managers
- Information Systems Managers
- Financial Managers
- Senior Executives

PMBOK Coverage Areas

- | | |
|--------------------------|-----------------------------|
| • Integration Management | • Human Resource Management |
| • Scope Management | • Communications Management |
| • Time Management | • Risk Management |
| • Cost Management | • Procurement Management |
| • Quality Management | |

COURSE OUTLINE

This course utilizes structured presentations, cases, exercises and group activities led by experienced and dynamic instructors.

I. Project Management Principles

- What are Projects
- Categories of Projects
- Project Life Cycles
- Role of the Project Manager
- Processes and Tools for Project Management

II. Organizing for Projects

- Types of Organizations
- Structuring the Project Team
- The Project Office
- Working With Stakeholders

III. Project Initiation and Definition

- Steps in Project Initiation
- Methods for Selecting Projects
- Developing a Business Case
- The Project Scope/Statement of Work
- Project Charter

IV. Planning the Project

- The Project Planning Process
- Elements of an Integrated Project Plan
- Project Start-Up and Kick-Off
- Making Plans Work
- The Project Notebook

V. Defining, Scheduling and Budgeting the Work

- Developing the Work Breakdown Structure (WBS)
- Assigning the Work
- Scheduling Techniques
- Resource Identification, Allocation and Leveling
- Estimating the Work
- Project Budgets
- Using Management Reserves

VI. Project Execution and Control

- Establishing the Project's Baseline
- Authorizing the Work
- Steps in Project Control
- Work Measurement Techniques
- The Earned Value Approach
- Statusing and Reviewing Projects
- Controlling Changes
- Replanning and Corrective Actions

VII. Quality Management

- Quality Concepts
- Requirements and Expectations
- Quality Management Framework
- Quality Tools

VIII. Human Side of Project Management

- Leadership and Management Styles
- Authority and Power in the Project
- Staffing, Building and Maintaining Teams
- Communication Plans and Processes
- Managing Conflict and Change
- Negotiations in Project Management

IX. Contracting and Procurement

- The Contracting Cycle
- Contracting Methods
- Contract/Procurement Management
- Best Practices

X. Project Closeout

- Varieties of Closeout/Termination
- Closeout Plan and Schedule
- Closeout Roles
- Customer Sign-Off and Acceptance
- Documenting Success and Lessons Learned

LEARN HOW TO . . .

- Structure a development process
- Use the system engineering process
- Measure technical performance
- Integrate the required technical activities

COURSE OVERVIEW

This course is designed to provide a comprehensive knowledge of technical program management. It is an integrated program covering all of the technical management processes in a program or project including: system engineering, concurrent engineering, integrated product and process development, software development and integration, technical specialty integration, manufacturing management, test and evaluation, logistics analysis and support, and technical program control. The course's purpose is to provide a flexible, integrated technical program management system which can be scaled to each application, both government and commercial, and at the same time comply with specific program requirements.

Take home tools include the 1,000 page "Technical Program Management" manual including text, notes and readings.

WHO SHOULD ATTEND THIS COURSE

This course is designed for industry and government technical managers, including:

- System Engineers
- Program Managers
- Design Engineers
- Software Engineers
- Production Managers
- Logistics Managers

PMBOK Coverage Areas

- Scope Management
- Risk Management
- Quality Management

COURSE OUTLINE

This course utilizes structured presentations, cases, exercises and group activities.

I. The Development Process

- Product Development Process
- Service Development Process
- Program/Project Management Process
- Integrated Product/Process Development

II. System Engineering

- System Elements
- System Engineering Functions
- System Engineering Process
- Work Breakdown Structure
- Specification Tree
- System Engineering Management
- Integrating Technical Specialties

III. Software Development and Management

- Software Planning and Control
- Software Process Models
- Software Development Steps
- Quality Assurance
- Capability Maturity Model Integration (CMMI)

IV. Technical Performance Measurement (TPM)

- Technical Risk Assessment
- Structuring a TPM Approach
- Specific TPM Tasks
- Integrating TPM With Cost and Schedule

V. Configuration/Data Management

- Configuration Management Planning
- Configuration Identification
- Baselines and Change Control
- Reviews, Verification and Audit
- Management of Technical Data

VI. Interface and Integration Management

- Interface Definitions
- Technical Integration Plan
- System Integration Management

VII. Test and Evaluation

- Test Requirements Analysis
- Development T&E
- Operational T&E
- Software Testing
- Managing the T&E Function

VIII. Production Management

- Production Planning
- Producibility Engineering
- Design for Manufacturing
- Product Surveillance

IX. Logistics

- Logistics Elements
- Logistics Planning
- Supportability Analysis
- Generating the Support Structure

X. Technical Program Control

- Steps in the Control Cycle
- Technical Control Processes
- Integrating Technical, Cost, Schedule and Risk

LEARN HOW TO . . .

- Understand the contracting and procurement processes
- Integrate contracting into project activities
- Work with the contract types
- Develop statements of work
- Negotiate/manage the contract effectively
- Interpret a contract
- Handle changes quickly and properly

COURSE OVERVIEW

This course is designed to explain the contracting and procurement processes, and their roles and responsibilities in these processes, to program/project managers, engineering, technical, operations and other functional personnel. It is intended to acquaint people who are carrying out the day-to-day contract work with proven methods for meeting quality, cost and schedule requirements in the complex world of contracting and subcontracting.

This course concentrates on what program/project managers, engineers and technical personnel need to know about the contracting process to properly carry out their roles. The course provides: a broad appreciation of the contracting and procurement processes; familiarization with the management problems associated with various types of contracts; the contract award and administration processes; and training in the various types of skills needed for the anticipation, identification and solution of contract problems, together with the use of effective communication and documentation techniques. The course curriculum is covered in-depth from both the buyer's and seller's viewpoint.

Take home tools include a complete course manual including text, presentation notes, visuals, and cases providing a valuable reference for future use.

WHO SHOULD ATTEND THIS COURSE

This course is designed for non-contracting and procurement personnel. Participants could include:

- Project and Program Managers
- Engineering and Operations Personnel
- Buyer's Technical Representatives
- Financial and Business Development Personnel

COURSE OUTLINE

This course employs a mix of learning approaches including structured presentations, exercises and discussion.

I. The Contracting Process

- Development of Requirements
- Methods of Contracting
- Selecting Contractors
- Managing the Contract

II. Contract Law

- Elements of a Contract
- Contract Formation
- Agency and Authority
- Laws and Regulations

III. Contract Types

- Fixed Price
- Cost Reimbursement
- Time and Material
- Indefinite Delivery/Indefinite Quantity
- Selecting the Contract Type

IV. Soliciting and Awarding Contracts

- The Contract/Procurement Plan
- Developing the Statement of Work/Objectives
- Using Specifications
- Preparing the Request for Proposal
- Proposal Preparation
- Source Selection
- Negotiation and Award

V. Cost, Price and Financial Requirements

- Estimating and Costing
- Pricing Concepts
- Price/Cost Analysis
- Financing and Payment

VI. Contract Management

- Key Terms and Conditions
- Contract Planning and Control
- Contract Review and Execution
- Progress Reporting
- Control of Subcontracts

VII. Contract Interpretation and Changes

- Rules for Interpretation
- Changes Clauses
- Identifying Changes
- Pricing and Managing Changes

VIII. Terminations or Closeout

- Convenience Terminations
- Default
- Closeout Planning
- Closeout Procedures
- Handling Disputes and Claims

PMBOK Coverage Areas

- Procurement Management
- Cost Management
- Scope Management
- Communications Management
- Quality Management

LEARN HOW TO . . .

- Strategize and plan a negotiation
- Negotiate organizational and project objectives
- Resolve conflicts
- Negotiate multi-party agreements
- Build better teams

COURSE OVERVIEW

People negotiate all the time. Negotiation takes place when two or more parties, each with their own objectives, seek to reach a mutually satisfying agreement. Negotiation is not the process of giving in or mutual sacrifice in order to secure an agreement. It is a process used to find a formula which will maximize the interest of all parties to the negotiation. Negotiation takes place in all phases of business.

Negotiation is of major importance in project/program management since it is one of the main tools of customers, project managers, team leaders and functional managers in planning and controlling the project. This course offers a complete approach to the development of the knowledge, attitude and skill required for success in negotiation. The emphasis is on the entire negotiation process, not just on a series of unrelated negotiation tactics. It provides both experienced and inexperienced negotiators with a complete conceptual framework for negotiation so that new experiences are added to and complement previous ones.

Take home tools include the text "Negotiation," 5th Edition, McGraw-Hill, plus presentation visuals and notes, case studies and supporting readings.

WHO SHOULD ATTEND THIS COURSE

Since negotiations are used to solve problems and conflicts both inside and outside the organization, participants could include:

- Senior Management
- Project and Program Managers
- Functional Managers
- Contracts, Procurement and Legal
- Project Team Members

PMBOK Coverage Areas

- Communications Management
- Human Resource Management
- Scope Management
- Procurement Management
- Cost Management

COURSE OUTLINE

This course is presented in two parts — Techniques of Negotiation and Negotiation Practice. Subjects covered include:

I. Nature of Negotiation

- Characteristics
- When and What to Negotiate
- Defining Strategy and Issues
- The Negotiation Process
- Distributive (Win/Lose)
- Integrative (Win/Win)

II. Human Values and Negotiation

- Psychology of the Individual or Group
- Human Value Systems
- Environmental Effects
- Dealing with Behaviors

III. Communication and Negotiation

- Elements of Communication
- Barriers to Communication
- Language and Negotiation
- Verbal vs. Nonverbal Techniques
- Physical Means of Negotiation

IV. Organizing for Negotiation

- Personal Qualifications for Negotiation
- Forming the Negotiation Team
- Agents, Principals and Coalitions

V. Preparation for Negotiation

- Developing Objectives
- Analyzing Strengths and Weaknesses
- Defining Bargaining Position
- Ranges of Agreement
- The Negotiation Plan

VI. Strategies, Tactics and Techniques

- Major Strategic Concepts
- Classification of Tactics
- Ethical Considerations
- Using and Responding to Techniques
- Dealing With Pressure Techniques

VII. The Negotiation Process

- Prenegotiation Considerations
- Fact-Finding Process
- Negotiating Process
- Concessions vs. Commitments
- Bargaining Techniques
- Methods of Reaching Agreement

VIII. Global Negotiations

- Negotiating Styles
- Cultural Differences
- Techniques for Cross-Border Negotiation

IX. Managing Difficult Negotiations

- Nature of "Difficult Negotiations"
- Strategies for Resolving Impasses
- Dispute Resolution

LEARN HOW TO . . .

- Build the key elements for performance measurement
- Develop the project baseline
- Utilize the proper measurement tools
- Use trend and variance analysis to improve performance
- Incorporate changes and maintain the baseline

COURSE OVERVIEW

An earned value management system is an integrating tool that allows program and project teams to have objective visibility into cost, schedule and technical progress on their programs or projects. This course covers all aspects of earned value management systems and provides step-by-step instruction in the development, implementation and use of an earned value management system.

Earned value is a management technique that relates resource planning to schedules and to technical performance requirements. All work is planned, budgeted, and scheduled in time-phased "planned value" increments, constituting a performance measurement baseline. As work is performed, it is "earned" on the same basis it was planned, in dollars or other quantifiable units such as labor hours. Planned value compared with earned value thus measures the volume of work planned vs. the equivalent volume of work accomplished. Earned value compared with the actual cost incurred for the work performed provides an objective measure of cost performance. Trend and variance analysis are used to take corrective action and forecast future performance.

Take home tools include a comprehensive manual containing text, lecture notes, supplementary readings and cases.

WHO SHOULD ATTEND THIS COURSE

Personnel in both large and small industry and government organizations who are concerned with the successful performance management of programs and projects will benefit from this course. Participant titles may include but are not limited to:

- Program and Project Managers
- Engineering Managers
- Software Managers
- Plant Managers
- Financial Managers
- Production Managers
- Contract Managers
- Staff Personnel Involved in Project Management

COURSE OUTLINE

This class uses a mix of learning approaches including classroom exercises, case studies, and discussion from these subjects:

I. Planning the Project/Program

- Steps in Project Planning
- A Project Plan Framework
- Integrated Master Plans/Schedules

II. Earned Value Management Systems (EVMS)

- Using Earned Value
- Essential EVMS Components
- How Earned Value is Used

III. Work Definition and Scheduling

- Using Work Breakdown Structures (WBS)
- Do's and Don'ts of WBS Development
- Tying the Schedules to WBS
- Integrating the Schedules

IV. Planning and Budgeting

- Defining the Scope in Detail
- Establishing Budget Baselines
- Management Reserves
- Revising Budgets

V. Forming and Measuring the Baseline

- Work Authorization Process
- The Rolling Wave Concept
- Discrete Work Measurement Techniques
- Measuring Apportioned and Level of Effort

VI. Accounting in EVMS

- Accumulation of Actual Cost
- Accounting for Material
- Indirect Cost Control
- Common Accounting Problems

VII. Performance Analysis

- Determining Planned Value/Earned Value/Actual Cost
- Using Performance Indices
- Variance Analysis
- Developing Estimates to Complete
- Technical Performance Measurement (TPM)
- Integration of TPM With Earned Value and Risk

VIII. Implementing EVMS

- Handling Program Changes
- Integrated Baseline Management Tools
- Reporting Requirements
- Evaluation

PMBOK Coverage Areas

- | | |
|--------------------------|-----------------------------|
| • Integration Management | • Cost Management |
| • Scope Management | • Communications Management |
| • Time Management | |

LEARN HOW TO . . .

- Work with various scheduling techniques
- Develop the schedule
- Load and level resources
- Maintain the schedule baseline

COURSE OVERVIEW

Project scheduling involves the preparation of project master schedules and subordinate schedules based on the work breakdown structure, to insure that all elements of the project's requirements including hardware, software, support items, and services are delivered or performed on time. Schedules are necessary to integrate the activities of the performing organizations tied to significant milestones. Work authorizations should clearly identify work statements, schedule requirements and cost elements to the lowest level of planning and control. This course teaches you how to: develop schedule approaches, interpret schedule reports, detect potential slips early, summarize schedule performance to higher management, and prevent abuses which can invalidate schedules and their purpose. You'll also learn about the array of scheduling tools and techniques with emphasis on Network Scheduling Techniques.

Take home tools include detailed reference materials such as visuals, notes, examples, and manuals.

WHO SHOULD ATTEND THIS COURSE

The course is designed for individuals who are involved in any aspect of the scheduling process. Participant titles include:

- Schedulers & Estimators
- Program/Project Managers
- Project Control Personnel
- Control Account Managers
- Operations Managers
- Product Team Personnel
- Engineering & Manufacturing Managers
- Test Managers
- Contracting and Purchasing Personnel

PMBOK Coverage Areas

- | | |
|--------------------|-------------------|
| • Scope Management | • Cost Management |
| • Time Management | • Risk Management |

COURSE OUTLINE

This class is presented using a combination of lecture and hands-on problems and cases to cover the following topics:

I. Scheduling – An Introduction

- Types of Schedules & Schedule Hierarchy
- Steps in Scheduling & Project Planning Process

II. Defining Activities and Events

- Project Scope Statement
- Work Outline/Work Breakdown Structure
- Forming Activity Lists & Sequencing Activities

III. Basic Scheduling Approaches

- Gantt & Milestone Charts
- Process & Set Back Charts

IV. Network Scheduling

- Arrow Diagramming Method (ADM)
- Precedence Diagramming Method (PDM)
- Critical Path Method (CPM)
- Program Evaluation and Review Techniques (PERT)
- Critical Chain Method

V. Schedule Development

- Project Network Logic Diagrams
- Duration Estimates
- Top Down vs. Bottom Up Scheduling
- Schedule Approaches & Level of Detail
- Tools and Techniques

VI. Resource Loading and Leveling

- Steps in Resource Analysis
- Loading Resources & Resource Efficiency
- Leveling Examples
- Splitting, Compressing and Stretching Activities

VII. The Schedule Baseline

- Schedule Baseline Development
- What If Analysis
- Schedule Reserves & Project Integration
- Status vs. Performance

VIII. Working the Schedule

- Progress Reports
- Statusing the Schedule & Updating the Network
- Forecasting & Schedule Changes
- Reporting and Analysis
- Crashing the Network

IX. Schedule Risk Analysis

- Risk Analysis in the Critical Path Method (CPM) and Precedence Diagramming Method (PDM)
- Quantitative Schedule Risk

X. Implementing Scheduling Systems

- The Scheduling Function & Scheduling Duties
- Who "Owns" the Float
- Keys to Successful Scheduling

LEARN HOW TO . . .

- Develop leadership skills
- Build and retain high-performing project teams
- Match the right talent with the right task
- Use proven techniques to motivate individuals and groups
- Effectively communicate and delegate in a team environment
- Identify and resolve conflicts proactively

COURSE OVERVIEW

Successful program/project management depends heavily on the effective interaction of the team members. This is a critical factor in how well they perform. Your people and team-building skills must be as sharp as your business and technical skills to manage and implement any program or project successfully. This class gives you an understanding of your management and leadership styles and how they impact the behavior of your colleagues. Gain insights into how to best structure your team to fit with the organizational culture, and to make best use of the members' strengths. Learn techniques to motivate, mentor, measure performance and coach your team, as well as tips on how to effectively use negotiation and conflict management when necessary.

Take home tools include the three-volume "Human Aspects of Project Management," presentation notes, cases, examples and exercises.

WHO SHOULD ATTEND THIS COURSE

All staff members involved in any aspect of the management of programs and projects will benefit from this course.

Participant titles may include but are not limited to:

- Program Managers & Project Managers
- Engineers & Telecom Managers
- Computer Specialists & Operations Managers
- Product/Process Team Members
- Senior Management

PMBOK Coverage Areas

- | | |
|-----------------------------|-----------------------------|
| • Integration Management | • Communications Management |
| • Quality Management | • Risk Management |
| • Human Resource Management | |

COURSE OUTLINE

This class is presented using a mix of lecture, case studies, group activities, exercises and class discussions from these subjects:

I. Project/Program Management Principles

- Project Management Process
- Role of Project Manager
- The Project Team – Roles and Skills

II. Organizing Projects

- Types of Project Organizations
- Identifying and Working with Stakeholders
- Designing a Project Organization That Works
- Defining Responsibility, Authority and Accountability

III. Understanding the Differences Between People

- The Basis for Understanding Behavior
- Why People Behave the Way They Do – Four Views
- Determining Your Behavior Preferences
- Motivation – Individual, Group and Organization
- The Motivational Process

IV. Leadership – The Challenge

- Leadership Traits, Qualities and Characteristics
- Leadership Models
- Choosing the "Right" Leadership Style
- Leadership in a Project Environment

V. Management – The Process

- A Model of Management
- Management Functions
- Schools of Management Thought

VI. Interpersonal Skills and Relationships

- Relationship of the PM to the Team – Customer – Sponsor – Management
- Building Relationships
- Project Manager Skills
- Gaining and Using Influence, Authority & Power

VII. Project Teams

- Teams vs. Work Groups
- When to Use/Not Use Teams
- Team Structures and Organization
- Cultural Diversity and Teams

VIII. Building and Managing the Team

- Five Step Approach
- Selecting the Right Members
- Stages of Team Development
- Maintaining Team Cohesion

IX. Communication and Conflict Management

- Elements and Means of Communication
- Barriers and Traps
- Communication Plans and Flows
- Conflict Types and Sources
- Conflicts in Project Phases
- Conflict Resolution Strategies

X. Problem Solving & Decision-Making

- Techniques for Proactive Problem Solving
- Effective Decision-Making in a Team Environment
- Negotiation Process and Strategies
- Traps to Avoid Conflict

LEARN HOW TO . . .

- Discuss communication issues
- Understand communication models and barriers
- Develop communication techniques for projects
- Assess communication systems
- Develop a communication plan

COURSE OVERVIEW

Skill in communication is crucial to success in any organization. Program/project management involves formal and informal communication at many different levels in the organization. Such communication includes all the activities and behaviors by which information or ideas are transferred between the program and product line managers and all of the major stakeholders – customer – management – functional managers – suppliers – other program managers and the public. The objectives of this two-day course are to: examine the nature of communication in a program/project environment; review the basic principles of personal and organizational communication; assess personal and organizational strengths and weaknesses; and formulate approaches to improve both internal and external communications in the organization.

Take home tools include a “Project Communications Management” manual including text, presentation notes and visuals, supplementary readings and case studies – a complete reference for later use.

WHO SHOULD ATTEND THIS COURSE

All personnel involved in project or program management will benefit from this course, including:

- Project and Program Managers
- Functional Managers
- Project Office Personnel
- Product Team Members
- Contract Managers
- Financial Managers
- Project Sponsors

PMBOK Coverage Areas

- Communications Management
- Integration Management
- Human Resource Management

COURSE OUTLINE

Structured presentations, case studies, self and group assessments, guided discussions, and group workshops are used. Subjects covered include:

I. Course Introduction

- Forms of Communication
- Communication Issues – Group Discussion

II. Communication Models, Methods and Barriers

- Myths and Realities of Communication
- Communication Models
- Who Do You Communicate With?
- Micro vs. Macro Communication Barriers
- Communications Load
- Communication Breakdowns

III. Personalities, Behavior and Communication

- The Differences Among People
- Personality Models
- How Different Personalities Communicate
- Perception and Communication
- Communication Styles
- Style Self-Assessment

IV. Interpersonal Communications

- Effective vs. Good Communication
- One to One Relationships
- Mapping the Network of Relationships
- Managing Interpersonal Feedback
- Conflict and Communications

V. Communications in the Program/Project Environment

- The Matrix and Communication
- Developing a Communications Policy
- Stakeholder Analysis
- Building a Communications Plan
- Selection Tools and Techniques
- Communications Approaches – What Works – Group Exercise

VI. Teams and Communication

- Stages of Team Development
- Team Communications Planning and Execution
- Virtual Teams Communication Approaches

VII. Communication Techniques

- Written Communications
- Uses and Misuses of Language
- Non-Verbal Communications
- Presentation Tips
- Listening
- Managing Meetings
- Communication, Listening and Feedback – Group Activity
- Communications Effectiveness Audit – Individual Exercise

VIII. The Communication System Assessment

- Is Everybody Getting the Message – A group activity designed to help in better understanding an organization's or program's communications. This activity should help attendees see opportunities for using untapped channels of communication.

IX. Case Analysis

- Group review and discussion of communication problems in a project.

X. Communications Plan Development

- Development of an outline communication plan for a program

LEARN HOW TO . . .

- Recognize sources of risk
- Assess risk with proven techniques and tools
- Balance risk and opportunity
- Take steps to mitigate the consequences of risk
- Break down the barriers to effective risk management

COURSE OVERVIEW

Risk in a project or program is a measure of the inability to achieve objectives within cost, schedule, technical, and cultural constraints. Risk can be defined as the probability of an event occurring and the significance or the consequences of the occurrence. This is different than uncertainty which considers only the likelihood of occurrence of the event. What this means to the project management team is that to truly understand whether a factor is “risky,” they must have an understanding of the potential impacts resulting from the occurrence or nonoccurrence of the event.

This course covers all aspects of risk management – risk identification – risk assessment – risk handling – risk communication. A series of qualitative and quantitative tools are explained and illustrated with examples, workshop exercises, and software demonstrations. The emphasis in the course is on explaining understandable and usable processes and tools that can be immediately put to work by all members of a project team.

Take home tools include a complete Risk Management Manual developed exclusively for the course. It contains presentation notes, visuals, text, readings on risk management techniques and tools, and illustrative cases and exercises.

WHO SHOULD ATTEND THIS COURSE

All staff members involved in any aspect of the management of programs and projects will benefit from this course. Participant titles may include but are not limited to:

- Program or Project Managers
- General and Operations Managers
- Financial Managers
- Business Development Managers
- Logistics Managers
- Project Team Leaders
- Engineers
- Contract Managers and Administrators
- Software/IT Managers

PMBOK Coverage Areas

- Scope Management
- Time Management
- Cost Management
- Quality Management
- Risk Management

COURSE OUTLINE

This course employs a mix of learning approaches including practical experience from classroom exercises, case studies and discussion from these subjects:

I. Using Risk Analysis in Projects

- Key Concepts in Risk Analysis
- Risk vs. Uncertainty
- Sources of Risk
- Categories of Risk
- Cultural Attitudes Toward Risk
- Basic Approaches to Risk Analysis
- Gathering Information

II. Approach to Risk and Decision Analysis

- Qualitative vs. Quantitative
- Risk Ranking
- Decision-Making Under Uncertainty
- Probability-Based Analysis
- Decision-Making Steps

III. Concepts in Probability

- Probabilistic Approach
- Qualitative Methods
- Probability Distributions

IV. Technical/Performance Risk Analysis

- Sources of Technical Risk
- Narrative, Qualitative, Quantitative Assessments
- Risk Scoring
- Technical Performance Measurement
- System Maturity Matrices
- Software Risk Analysis

V. Cost Risk Analysis

- Causes of Cost Risks
- Steps in Cost Risk Assessments
- Single Point Estimates, Ranges and Distributions
- Identifying the Cost Drivers
- Risk and the WBS

VI. Schedule Risk Analysis

- Why Projects Overrun Schedules
- Risk Analysis in CPM and PDM Methods
- Quantitative Schedule Risk
- Schedule Risk Issues

VII. Integrated Risk Analysis

- Developing an Integrated Architecture
- Using Earned Value Techniques
- Integrating Programmatic Risks

VIII. Project Risk Management

- The Risk Management Plan
- Risk Teams
- Risk Handling Techniques
- Cost, Schedule, Technical Tradeoffs
- Implementing Risk Management Programs

LEARN HOW TO . . .

- Define requirements and project scope
- Develop and use the WBS
- Employ estimating and budgeting tools
- Build an integrated schedule
- Baseline a project
- Measure and control performance

COURSE OVERVIEW

This course provides the tool kit for effective planning and control of a project's scope, schedule and cost. Attendees learn how to prevent the three common problems in project management – "underperformance," "behind schedule," and "over budget." The course delivers techniques to help project teams plan and work with realistic requirements, work definitions, schedules, estimates, budgets and controls while maintaining stakeholder awareness and support.

Take home tools include the text "Project Management Using Earned Value," Humphreys & Associates, visuals, presentation notes, cases and exercises.

WHO SHOULD ATTEND THIS COURSE

Any individual involved in any aspect of project or program management will benefit from the course, including:

- Project Managers
- Program Managers
- Project Support Personnel
- Product Team Leaders
- Functional Managers
- Financial Personnel
- Contract Managers
- Senior Management

PMBOK Coverage Areas

- | | |
|--------------------------|----------------------|
| • Integration Management | • Time Management |
| • Scope Management | • Quality Management |
| • Cost Management | |

COURSE OUTLINE

This course employs a mix of structured presentations, cases, exercises and group activities to achieve the learning objectives.

I. Setting the Stage

- Program or Project Management Processes
- The Quadruple Constraint
- Managing Project Integration

II. Developing the Project Scope

- Determining/Documenting Requirements
- The Business Case
- Project Scope Management Plan
- Building a Statement of Work

III. Work Breakdown Structures

- Product vs. Process WBS
- Steps in Developing a WBS
- Developing the WBS Dictionary
- Organizational Breakdown Structures
- Assigning the Work

IV. Scheduling

- Scheduling Techniques
- Hierarchy of Schedules
- Defining Activities and Events
- Scheduling Calculations
- Resource Loading and Leveling
- Schedule Risk Assessment
- Keys to Successful Scheduling

V. Cost Management

- Finance Fundamentals
- Types of Costs
- Financial Analysis Techniques
- The Estimating Process
- Estimating Techniques
- Estimating Concerns and Constraints
- Establishing Project Budgets

VI. Project Control Systems

- Forming the Project Baseline
- Work Authorization
- Project Control Processes
- Project Metrics, Reporting and Reviews
- Change Control

VII. Using Earned Value Management Systems

- Essential Features of Earned Value
- EVM Components
- The Performance Measurement Baseline
- Measuring Accomplishment
- Variance Analysis and Corrective Actions
- Trend Analysis and Forecasting

VIII. Change Management

- Identification of Changes
- Change Control Process
- Determining Performance, Cost and Schedule Impact
- Implementing Changes

FEATURES . . .

- Hands-on application of all concepts
- PMP® certified instructors
- A complete methodology for managing projects using Microsoft® Project
- Best Practices, Tips & Tricks
- Two case studies (one is a student project)
- One-on-one coaching

COURSE OVERVIEW

This hands-on workshop focuses on using Microsoft® Project across the lifecycle of managing a project. Participants will learn and apply a complete methodology for using Microsoft® Project. The workshop includes Best Practices, Tips and Tricks, and techniques for maximizing efficiency.

Students work through two case studies – one provided in class, the other provided by each student, and should be a project they are currently working on or about to initiate. All topics are applied to both case studies, and students create a full Microsoft® Project file of their own to take back for immediate application on the job. Students are also encouraged to bring any current Microsoft® Project files to class for refinement.

The instructional program is aligned with the Project Management Institute's "A Guide to the Project Management Body of Knowledge" (PMBOK® Guide).

Take home tools include a full color student manual.

WHO SHOULD ATTEND THIS COURSE

All personnel who are involved in scheduling projects or programs will benefit from this course, including:

- Project Team Members
- Project Managers
- Program Managers
- Anyone working with MS Project

PMBOK Coverage Areas

- Time Management
- Integration Management

COURSE OUTLINE

I. Project Management Fundamentals

- Background Information

II. Microsoft Project Environment

- Interface Overview
- Starting MS Project/Menus
- Default Settings

III. Starting Your Project

- Base Calendars/Standard Calendar
- Starting Your Project

IV. Entering Task Information

- Outlining Your Project (WBS)
- Entering Task Durations
- Types of Tasks/Task Calendars

V. Task Relationships

- Dependencies
- Activity #5 Adding Dependencies
- Deadlines/Constraints
- Activity #6 Adding Constraints and a Deadline

VI. Network Diagram and Critical Path

- Managing Your Schedule Using Critical Path Analysis
- Network Diagram
- View the Critical Path on the Gantt Chart as Default

VII. Multi-Project (Program) Management

- Consolidating Multiple Projects Into a Master Project
- Program Management Using MS Project Desktop

VIII. Assigning Resources

- Adding Resources to Tasks – Best Practices
- Material Resources
- Using a Resource Pool for Multiple Projects

IX. Scheduling Resources

- Options for Scheduling Resources
- Fixed Units, Fixed Work, Fixed Duration
- Adjusting Scheduling Time with Calendars

X. Resource Conflicts

- How to Identify and Manage Conflicts and Over-Allocations

XI. Establishing a Baseline

- Why Baseline? Looking at Variance, Lessons Learned

XII. Updating Project Progress

- Earned Value in MS Project
- How to Update, What Data Gets Updated
- Entering Actual Work – Hours or Complete
- Outputting Status Reports

XIII. Views

- Exploring Standard Views
- Applying Tables and Filters to Views

XIV. Reports

- Overview of all Reports
- Customizing Reports, Printing Reports

Project Management Professional Exam Preparation

Course No. 599

Four Days

The framework for passing the PMP® Exam

LEARN HOW TO . . .

- Prepare for the exam
- Evaluate your strengths and weaknesses
- State the key concepts
- Understand how the processes interact
- Study for what is important

COURSE OVERVIEW

To earn the Project Management Institute's certification as a Project Management Professional (PMP®), an applicant must demonstrate that he or she has extensive experience in the project management field and pass a 200 question examination. The examination covers the five project management processes and the nine knowledge areas contained in PMI®'s Guide to the Project Management Body of Knowledge (PMBOK™).

This course is designed to help attendees prepare for the PMP® examination, and to improve a person's chances of passing the examination. The course is patterned on the examination and covers the five process and nine knowledge areas in detail.

The course reviews the key concepts and terminology in all of the knowledge areas. Sample questions are taken by attendees in a format similar to the examination. Attendees can determine their strengths and weaknesses in preparation for taking the actual examination.

Take home tools include a detailed course manual with notes, visuals, exercises, and practice questions. In addition, each attendee receives a copy of PMI®'s Guide to the Project Management Body of Knowledge.

WHO SHOULD ATTEND THIS COURSE

Any person who plans to apply for and take the Project Management Professional (PMP®) Examination will benefit from this course.

PMBOK Coverage Areas

- | | |
|--------------------------|-----------------------------|
| • Integration Management | • Human Resource Management |
| • Scope Management | • Communications Management |
| • Time Management | • Risk Management |
| • Cost Management | • Procurement Management |
| • Quality Management | |

COURSE OUTLINE

This course uses structured presentations, class exercises, and mock examination sessions.

I. Project Management Process

- Initiating
- Planning
- Executing
- Monitoring and Controlling
- Closing

II. Managing Scope in Projects

- Initiation – Requirements Gathering – Requirements Prioritization
- Scope Planning – Scope Planning Exercise
- Scope Definition
- Scope Verification – Earned Value
- Scope Change Control

III. Managing Time in Projects

- Activity Definition
- Activity Sequencing – Sequencing Exercise
- Activity Duration Estimating – Analogous Estimating – Bottom Up Estimating – Parametric Estimating
- Schedule Development – Dependencies – Diagramming Techniques
- Schedule Control – Earned Value

IV. Managing Cost in Projects

- Resource Planning
- Cost Estimating – Estimating Exercise
- Cost Budgeting
- Cost Control – Earned Value

V. Managing Quality in Projects

- Quality Planning – Quality Function Deployment
- Quality Assurance – Quality Measurement Exercise
- Quality Control – Seven QC Tools

VI. Managing Human Resources in Projects

- Organizational Planning
- Staff Acquisition
- Team Development – Earned Value

VII. Managing Communications in Projects

- Communication Planning – Stakeholder Analysis Exercise
- Information Distribution
- Performance Reporting – Earned Value
- Administrative Closure

VIII. Managing Risk in Projects

- Risk Identification
- Risk Quantification – Decision Tree Analysis, Exercise – Probability Analysis, Exercise – The Merge Bias
- Risk Response Development
- Risk Response Control

IX. Managing Procurements in Projects

- Procurement Planning – Contract Types – Contract Risks – Exercise
- Solicitation Planning
- Solicitation
- Source Selection
- Contract Administration
- Contract Close-Out – Dispute Resolution

X. Managing Project Integration

- Project Plan Development
- Project Plan Execution
- Overall Change Control

XI. Preparing for and Taking the Exam

- The Structure of the Exam
- Studying for the Exam
- Taking the Test

AGU Accreditation

Full accreditation distinguishes American Graduate University from unaccredited education providers, which are appearing in growing numbers in the professional-education market. American Graduate University's graduate degree programs are accredited by the Accrediting Commission of the Distance Education and Training Council (DETC). The Accrediting Commission of DETC is listed by the U.S. Department of Education as a nationally recognized accrediting agency and it is also a recognized member of the Council for Higher Education Accreditation. American Graduate University has full institutional approval from the State of California Bureau for Private Postsecondary and Vocational Education to grant advanced degrees.

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