Designed to Meet the Latest Performance Mandates in Government Contracting!



CONTRACTING & ACQUISITION FOR GOVERNMENT

2005-2006 OFFERINGS

Improving Acquisition Performance and Contract Management in Government

Earn PDUs and CPE Credits

PUBLIC COURSES

ON-SITE TRAINING

ACQUISITION STRATEGY SERVICES

Project Management Institute R.E.P.®

The Performance Institute

The Leader in Government Performance Contracting and Acquisition Management

Transferring Knowledge to Transform Government

www.PerformanceWeb.org

"Agencies should apply Performance-Based Service Acquisition methods on 40 percent of eligible service actions over $25,000."

- Office of Management and Budget, 9/7/2004

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The NEW Acquisition Performance Mandates...

The Seven Step Process for Performance-Based Acquisition



Project Management Mandates for Contracting

Federal Acquisition Regulation, 34.X01

"Earned Value Management is required in acquisitions designated, in accordance with agency procedures, as major acquisitions subject to OMB Circular A-11."

Drivers of New Contracting & Acquisition Standards for Government in the Past Year:

- Performance-Based Contracting
- Earned Value Contract Management
- Expanded Use of Commercial Practices
- Appropriate Use of the Inter-Agency Vehicles & GSA Schedules
- Strategic Sourcing
- Contracting Ethics
- Service Acquisition Reform Act

What Competencies Will Help the Acquisition Workforce Manage for RESULTS?

The Performance Institute has developed a comprehensive contract management and acquisition performance training program designed exclusively for government contract managers. The courses are offered year-round at scheduled training events and to agencies that wish to bring the training on-site. Each course is taught by an expert facilitator who brings a wealth of experience and knowledge to each training session.

ACQUISITION PERFORMANCE IN GOVERNMENT

- Performance-Based Contracting
- Advanced Performance-Based Acquisition: Solutions Development
- Monitoring and Managing Contract Performance

CONTRACT PROJECT MANAGEMENT

- Project Management for Government Procurement
- Earned Value Project Management
- Managing Project Risk
- Managing Project Teams

ENTERPRISE SOURCING STRATEGY

- Managing Competitive Sourcing
- Strategic Sourcing
- Structuring and Measuring a Most Efficient Organization (MEO) for A-76
- Project and Acquisition Planning for A-76 Competitions

ACQUISITION LEADERSHIP SKILLS

- Ethics in Government Contracting
- Leadership Strategies for the Public Sector
- Business Analysis and Critical Thinking

Access the Institute's Acquisition Support Through Three Vehicles

OPTION 1
Publicly Offered Courses

OPTION 2
On-Site Customized Training

OPTION 3
Acquisition Strategy Services

DAR and FAR Regulations Impose Project Management Standards

The Institute offers PDUs on Contracting Courses

Project Management Institute R.E.P.®

Master the Latest Performance and Accountability Standards for Government Contract Management

Throughout the year, the Performance Institute schedules a number of contracting & acquisition courses—providing training on all of the topics covered in the Institute's government contracting & acquisition curriculum. Content in each training course is directly aligned to address the contracting & acquisition standards being implemented in government. Each course will also update attendees on the latest mandates and hot topics from the Office of Management and Budget, Congress, the Office of Federal Procurement Policy and state and local governments.



Attend Publicly Offered Events on Specific Contracting & Acquisition Topics

"We have to make sure that every person coming into federal service in the procurement arena has access to training."

- David Safavian, Administrator, Office of Federal Procurement Policy

Benefits of Training

With over 10,000 government managers attending more than 300 public-offered programs annually, The Performance Institute is the leader in providing training to government. In the contracting & acquisition skills area alone, the Institute offers training courses on 14 separate contracting & acquisition topics. You will emerge from Institute training programs with a thorough understanding of all course concepts—and poised to apply what you learned in a real and practical way in your work.

Methodology-Driven Curriculum

All Institute training courses follow a clear and refined curriculum that is driven by the latest mandates and standards for contracting & acquisition in government.

Competency-Based Education

Instructional approaches in Institute training courses are geared toward enhancing participants' skills and building the competencies for contract & acquisition managers in government as defined by the President's Management Agenda and the Office of Management and Budget.

Learn from the Leaders

Instructors of Institute courses are all seasoned professionals with direct knowledge and experience in government contracting. In many cases, training programs feature government presenters from standard setting bodies (OPM, OMB, GAO, Congress, etc.), as well as case study presenters from recognized best practice government agencies.

Case Studies and Best Practices

Institute courses go beyond presenting frameworks and toolkits for addressing each topic—they also provide best practice examples and case studies from acquisition leaders.

Addressing the Latest FAR & DAR Mandates

As new mandates and requirements in contracting & acquisition are set by government entities, the Institute updates its training programs to reflect the latest requirements. Each course begins by updating and training participants on the latest mandates and their application in government.

2005-2006 Contracting & Acquisition Course Schedule

AUGUST 2005

Earned Value Project Management
August 29-30, 2005 in Arlington, VA

SEPTEMBER 2005

Project Management for Government Procurement
September 19-20, 2005 in Arlington, VA

OCTOBER 2005

Managing Project Risk
October 5-6, 2005 in Las Vegas, NV

Earned Value Project Management
October 6-7, 2005 in Las Vegas, NV

Managing Project Risk
October 20-21, 2005 in Arlington, VA

NOVEMBER 2005

Performance-Based Contracting
November 14-15, 2005 in Arlington, VA

Managing Project Teams
November 14-15, 2005 in Arlington, VA

Project Management for Government Procurement
November 29-30, 2005 in Arlington, VA

DECEMBER 2005

Managing Competitive Sourcing
December 1-2, 2005 in Arlington, VA

Monitoring and Managing Contract Performance
December 12-13, 2005 in Arlington, VA

Business Analysis & Critical Thinking
December 15-16, 2005 in Arlington, VA

Leadership Strategies for the Public Sector
December 19-20, 2005 in Arlington, VA

JANUARY 2006

Advanced Performance-Based Acquisition: Solutions Development
January 12-13, 2006 in Arlington, VA

Structuring and Measuring a Most Efficient Organization (MEO) for A-76 Competitions
January 11-12, 2006 in Arlington, VA

Ethics in Government Contracting
January 26-27, 2006 in Arlington, VA

FEBRUARY 2006

Project and Acquisition Planning for A-76 Competitions
February 6-7, 2006 in Arlington, VA

Strategic Sourcing for Government
February 8-9, 2006 in Arlington, VA

Managing Project Risk
February 8-9, 2006 in Arlington, VA

Earned Value Project Management
February 9-10, 2006 in Arlington, VA

MARCH 2006

Managing Competitive Sourcing
March 9-10, 2006 in Arlington, VA

Leadership Strategies for the Public Sector
March 13-14, 2006 in Arlington, VA

Managing Project Teams
March 15-16, 2006 in Arlington, VA

APRIL 2006

Project Management for Government Procurement
April 10-11, 2006 in Arlington, VA

Ethics in Government Contracting
April 10-11, 2006 in Arlington, VA

Performance-Based Contracting
April 12-13, 2006 in Arlington, VA

Monitoring and Managing Contract Performance
April 13-14, 2006 in Arlington, VA

MAY 2006

Business Analysis & Critical Thinking
May 11-12, 2006 in Arlington, VA

JUNE 2006

Managing Project Risk
June 7-8, 2006 in Arlington, VA

Earned Value Project Management
June 8-9, 2006 in Arlington, VA

Advanced Performance-Based Acquisition: Solutions Development
June 12-13, 2006 in Arlington, VA

Structuring and Measuring a Most Efficient Organization (MEO) for A-76 Competitions
June 14-15, 2006 in Arlington, VA

Managing Competitive Sourcing
June 26-27, 2006 in Arlington, VA

JULY 2006

Managing Project Teams
July 13-14, 2006 in Arlington, VA

Project and Acquisition Planning for A-76 Competitions
July 17-18, 2006 in Arlington, VA

Strategic Sourcing for Government
July 19-20, 2006 in Arlington, VA

AUGUST 2006

Ethics in Government Contracting
August 10-11, 2006 in Arlington, VA

Project Management for Government Procurement
August 30-31, 2006 in Arlington, VA

SEPTEMBER 2006

Performance-Based Contracting
September 1-2, 2006 in Arlington, VA

Business Analysis & Critical Thinking
September 5-6, 2006 in Arlington, VA

Monitoring and Managing Contract Performance
September 7-8, 2006 in Arlington, VA

Leadership Strategies for the Public Sector
September 18-19, 2006 in Arlington, VA

Managing Project Risk
September 20-21, 2006 in Las Vegas, NV

Earned Value Project Management
September 21-22, 2006 in Las Vegas, NV

Full Descriptions of Courses and an Up-To-Date Schedule are Located Online at:

www.PerformanceWeb.org/Training

"SARA will provide our acquisition workforce with the necessary tools to succeed through a carefully crafted set of provisions along with training and insightful management based on results and accountability."

- Service Acquisition Reform Act (PL-108-136)

Receive Your Project Manager Certificate!

Many Contract Managers are Required to Receive Project Management Certification

Institute Contracting & Acquisition Courses Offer CPE Credits and PDUs!

Check Individual Course Listings for Total Credits and Units Awarded.

® R.E.P. Project Management Institute

CPE
CONTINUING PROFESSIONAL EDUCATION

Enhance the Skills of Your Acquisition Workforce Through On-Site Training

One of the more popular vehicles for accessing the Institute's government contracting and acquisition education has been on-site delivery of training. On-site training allows you to select course content that directly relates to your acquisition team's needs. More importantly the Institute's on-site training courses draw examples from your organization and typically use a "case study" contract that can be used as an actual work product for your acquisition team. Institute training managers stand ready to help define your needs and craft a customized in-house training program for your acquisition team.



Customize a Training Program For Your Acquisition Team

How the Institute Customizes its Training

STAGE ONE
MISSION AND MANDATE ALIGNMENT

STAGE TWO
ACQUISITION WORKFORCE ASSESSMENT

STAGE THREE
ACQUISITION DEVELOPMENT PLAN

STAGE FOUR
TRAINING DELIVERY

STAGE FIVE
MEASURE AND REPORT PERFORMANCE

Benefits of On-Site Training

Tailored Programs To Fit Your Unique Needs

The Performance Institute will customize training courses to fit your acquisition team's specific needs. Single courses can be offered, or an entire package of specialized courses. Create a customized contracting & acquisition training program to meet your agency's specific goals and jump start major management initiatives within your department.

Draw From Your Own Program Challenges

Instructors will examine agency programs for specific examples to use during each training course. Interactive exercises can employ an actual contract from within the agency.

Integrate With Other Initiatives

Training can be the perfect complement to other initiatives being managed by your acquisition team. By aligning training with management policies, change management is bolstered.

Improve The Impact Of Training

By customizing your training and aligning the curriculum of each session to the specific needs of the agency, the learning outcomes are dramatically enhanced.

Maximize Your Training Dollars

In-house training is far more economical than per-person training courses. Moreover, by bringing training to your location, travel expenses are virtually eliminated.

Schedule a "Logic Model" Session to Develop Your Statements of Work and Statements of Objective

Develop Performance-Based Statements of Work and Statements of Objective in Days... Not Months!

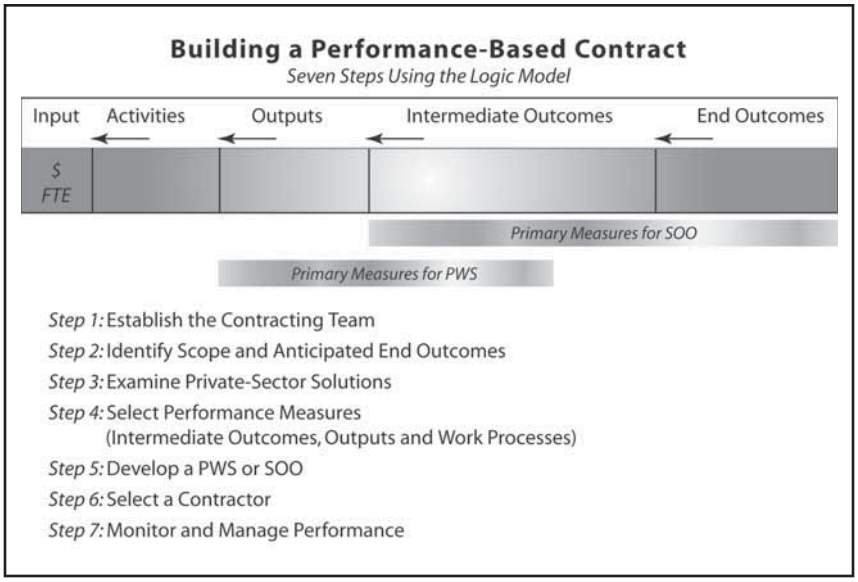
As the nation's largest think-tank dedicated exclusively to government performance, the Institute works directly with agencies on an individual contract basis or on an agency-wide acquisition strategy to improve the success of their contracts.

Through its work, the Performance Institute has defined and refined a proven methodology for measuring government performance: The Logic Model. This methodology can help your agency define a process for managing and measuring your contracts. The Performance Institute's expert advisors provide a variety of contracting and acquisition support services available to government agencies.

Training is conducted using actual contracts from the client agency during the program providing real life, practical examples for your acquisition team.

On-site training sessions will:

- Train and educate staff on the Seven-Step Methodology for developing, implementing and managing performance-based contracts
- Review best practices and examine how to best develop performance measures that will motivate and manage contractors
- Utilize actual and useful examples from your agency



Deliverables

- Receive Team Training in the Seven Step PBSA Process
- Establish Your Contracting Team and Clearly Define Roles
- Develop a Performance Work Statement
- Establish Contract Performance Measures
- Create Financial and Non-Financial Incentives in Contracts

> "This course was very useful in helping us write our performance-based contracts."
>
> - Susan Phillips, DoD



For more information, contact Blake Zach at 703-894-0481 or Zach@PerformanceWeb.org

Tap the Institute to Define Performance-Based Aquisition Strategies

The Performance Institute's expert advisors provide a variety of contracting and acquisition support services available to government agencies. Using the latest contracting and acquisition management methodologies the Institute works directly with agencies on a single contract basis or on a complete agency-wide acquisition strategy.

Benefits of Institute Acquisition Services:

Develop Performance Statements of Work

Create specific and clearly defined contract goals stated in terms of desired results

Evaluate and Manage Contractor Performance

Acquire knowledge to maintain proper oversight of performance-based contracts

Develop Best-in-Class Performance Measures

Create effective performance measures for your organization that will motivate contractors and deliver results

Provide Incentives for Improved Results

Motivate and encourage contractors through appropriate performance measures

> "Great simple models that we can use right away to develop measures with our program side—easy and quick and non-threatening models to use for results."
>
> - Rich Moraski
> U.S. Department of Agriculture

GSA Schedule

Easy Access to Institute Consulting Services through MOBIS

(PI MOBIS Contract Number: GS-10F-0261M)

The Performance Institute's Acquisition Governance Model



Comprehensive Services for Each Step of the PBSA Process

Step	Institute Services Available to Acquisition Teams
STEP 1 **Establish an Integrated Acquisition Team**	• Ensuring team members have competencies that match the complexity of the acquisition • Implementing effective project management protocols
STEP 2 **Define the Problem to Be Solved**	• Aligning acquisition project to agency mission & goals • Establishing baseline of performance and cost for the activities being sourced
STEP 3 **Examine Private and Public-Sector Solutions**	• Market research and benchmark identification • Facilitation of "solutions development" process between agency and potential vendors (advanced RFI process)
STEP 4 **Develop Performance Work Statement or Statement of Objective**	• Development (or Evaluation) of the Performance Work Statement (PWS-SOW) • Development (or Evaluation) of the Statement of Objectives (SOO)
STEP 5 **Develop Performance Measures**	• Selection of outcome-oriented performance measures • Identification of measurement data sources
STEP 6 **Select the Right Contractor**	• Past performance evaluation of contractors • Interactive facilitation of review of proposals by acquisition team based on performance criteria
STEP 7 **Monitor and Manage Performance**	• Development of performance management system to collect and monitor performance measures • Identification of continuous improvement approach using incentives and benchmarks • Development of "Relationship Management Plan" to provide ongoing collaboration between agency and vendor

The National Contract Management Association Contracting Management Body of Knowledge

The Performance Institute Provides Acquisition Solutions that Reflect the Latest CMBOK from NCMA

Contract Principles
The fundamentals of acquisition that all contracting professionals must understand, including standards of conduct, laws and regulations, socioeconomic programs, contract structures, contract finance, contracting methods and intellectual property.

Acquisition Planning and Strategy
The process through which all activities and events leading up to the award of a contract are planned, including acquisition planning, acquisition methodology, proposal preparation, negotiation, source selection, and both pre- and post-award protest.

Contract Administration
Management of issues that arise during the performance of a contract, such as quality assurance, subcontract management, change management, and contract closeout or termination.

Specialized Knowledge Areas
Areas that require additional specialized knowledge, including research and development (R&D), architecture, engineering, information technology, service and international contracting.

General Business
Other disciplines relevant to contract management, such as marketing, operations management, finance analysis, accounting, economics and information science.

For more information, contact Ron Garnett at 703-894-0481 or Garnett@PerformanceWeb.org

As the nation's largest think tank studying government performance issues, the Performance Institute maintains an extensive research base that agencies can harness to mine and implement proven acquisition practices in government.

Model Statements of Work



As the government increases service consumption, they often seek to improve their outsourcing and project management processes. Statements of work are the most challenging of the requirement documents and if left incomplete or unclear can court disaster. The statement of work must be done properly and with attention to many intricate details. Contracting for timely, high quality products or services are wholly dependent on the statement of work. The Performance Institute provides both strategic and practical insight into the preparation of effective performance-based and functional statements of work. Our research and best practices knowledge base will help you produce statements of work that are clear, concise and effective while providing accountability for the final outcome.

Excellence in Performance-Based Service Acquisition Award



In an effort to provide incentives and support to government agencies that implement and improve their performance toward using PBC techniques, The Performance Institute together with the General Services Administration bestow upon an agency acquisition employee the Excellence in Performance-Based Service Acquisition Award. The goal of this award is to recognize any member of an agency acquisition team that worked effortlessly on a performance based contract using elements prescribed in FAR 37.6 and the process outlined in the Seven Steps to PBSA guide.

To learn more visit:
http://www.excellenceinacquisition.org/pbsa/background.htm

Performance Measures Database



In an increasingly performance measurement-driven government, future budgets and resources will be granted to organizations with the ability to effectively communicate their accomplishments and demonstrate their impact on performance outcomes. The Performance Institutes core measures database will help you get access to the meaningful measures you need to move your agency and programs forward. Query our interactive database of performance measures and best practices. We bring analytical rigor and accuracy, performance management expertise, and actionable insights tailored to the unique needs of federal, state, and local government.

Acquisition Performance Survey



We've entered a new era of performance accountability in government. Nowhere is this more evident than in the area of contract management. Government acquisition staff are now being held accountable for managing contract performance outcomes. The Performance Institute wants to know how these changes have affected YOU! PI is pleased to unveil its online Contract and Acquisition Survey! This survey is designed to answer an important question: Have government contract managers reacted to these new requirements to measure, report, and evaluate contractor performance?

Also, as a way of saying thank-you for completing the survey, you will receive a summary report based on your responses.

Take this 10 minute survey to see how YOUR agency or program compares to other similar organizations that are using performance management to get RESULTS. The Acquisition Performance Survey can be found at:
http://www.PerformanceWeb.org/Survey/

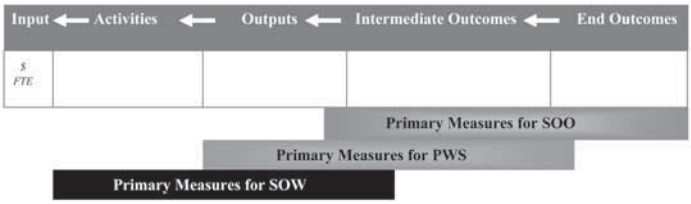
ACQUISITION PERFORMANCE

Performance-Based Contracting

Government is now more results-oriented, particularly in the way which government contracts are written. One of the most important challenges facing agencies is the need for widespread adoption of performance-based contracting, but many acquisition personnel lack the necessary skills to develop and implement Performance-Based Service Acquisition (PBSA). The seven-step process for developing performance-based contracts simplifies the process and outlines the most efficient way to achieve the goals defined by OMB. The process also provides new insight on defining goals and improving transparency and accountability in government contracting that will produce results.

The performance-based contracting training is based on writing a contract that focuses on performance goals using the cutting edge seven-step framework which serves as a template for agency contracts.

BUILDING A PERFORMACE-BASED CONTRACT
SEVEN STEPS USING THE LOGIC MODEL



Step 1: Establishing the Contracting Team
Step 2: Identify the Scope and Anticipated End Outcomes
Step 3: Examine Private-Sector and Public-Sector Solutions
Step 4: Select Performance Measures (Intermediate Outcomes, Outputs, and Work Processes)
Step 5: Develop a PWS or SOO
Step 6: Select Contractor
Step 7: Monitor and Manage Performance

COURSE AVAILABILITY AND CREDITS

November 14-15, 2005 in Arlington VA (Code: C151)
April 12-13, 2006 in Arlington VA (Code: C153)
September 1-2, 2006 in Arlington VA (Code: C1000)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE **Earn 12 CPEs**
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Update on Performance-Based Contracting Requirements in Government
- Understand the latest from the Office of Federal Procurement Policy and legislation including the Services Acquisition Reform Act (SARA)

Step 1: Establish the Team
- Benchmark the purpose, objective and projected outcome of the contract team
- Clearly identify and define the roles and responsibilities of all participants, including vendors
- Create a link between the program's mission and it's individual team members

Step 2: Decide which Problem Needs Solving
- Learn to effectively assess current levels of performance
- Determine the "end-outcome" of your contract
- Link acquisitions to organizational mission and performance objectives

Step 3: Examine Private-Sector and Public-Sector Solutions
- Conduct efficient and productive market-sector research
- Improve contract development by effectively utilizing private-sector input before writing PWSs and crafting SOOs
- Apply experience from public-sector counterparts

Step 4: Develop and Select Contract Performance Measures
- Identify effective performance measures using the "SMART" performance measure criteria
- Develop end and intermediate outcome performance measures
- Use performance measures to successfully motivate and manage

DAY TWO

Step 5: Develop a PWS or SOO
- Learn the key components of a PWS and an SOO
- Gain essential insight regarding the development of a PWS or SOO

Step 6: Select the Right Contractor
- Learn to interpret past performance to predict future results
- Determine the "best value" when presented with a diversity of proposed services
- Tackle potential conflicts of interest

Step 7: Monitor and Manage Performance
- Learn to establish a clear line of performance accountability
- Incorporate the contractor into the team to improve results
- Maintain continued measurement during the contract to improve further results

Earned Value Management Overview: Methodologies, Tools and Terminology
- Understand the importance of EVM and learn key tools and techniques
- Gain consensus on planned budget, cost and performance targets
- Learn effective techniques for tracking progress and adapting to unplanned obstacles

Application Session: Developing a Performance-Based Contract
- Create a project plan for implementation of a PBC
- Create a QASP to help monitor performance
- Create PWS or SOO for acquisition

Advanced Performance-Based Acquisition: Solutions Development

The maximum potential of Performance-based Service Acquisition is found in the forging of a collaborative relationship between government and the private sector to develop and implement solutions that improve government performance. This ultimate goal requires that government improve its use of market research in the pre-solicitation phase of an acquisition and to collaborate with vendors on truly innovative solutions to government problems.

Under the FAR, contact with vendors and suppliers for purposes of market research and government understanding market innovation is encouraged. FAR 15.201(a) allows for the exchange of information "among all interested parties, from the earliest identification of a requirement through receipt of proposals." However, once a procurement is underway, a number of limitations are applied (FAR 3.104) to ensure that prospective contractors are treated fairly and impartially and that standards of procurement integrity be maintained. This course will equip you with the latest guidance and approaches for complying with fairness standards while engaging the private sector in the most collaborative and innovative acquisition process to achieve maximum performance improvements for your agency.

COURSE AVAILABILITY AND CREDITS

January 12-13, 2006 in Arlington, VA (Code: C158)
June 12-13, 2006 in Arlington, VA (Code: C1005)

Open Enrollment:
Course Level: Beginner
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE Earn 12 CPEs
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Solutions Development Using Performance-based Acquisition: The REAL Innovative Opportunity with PBSA

- Lessons-Learned from private sector "solutions development" approaches using PBSA
- Overview of FAR and DAR authorities that allow for (and regulate) collaborative solutions development between government and potential vendors

Defining What Agency Problem Needs Fixing

- Establish a clear baseline of cost and performance of status quo
- Develop and publish a "base case" for experts and vendors to examine in offering potential solutions

Contracting for Acquisition Advice: Use of Consultants and Industry Experts

- When and how to involve experts in reviewing baseline operations and proposing acquisition strategy

Fundamentals of Market Research for Government

- Look for previous or existing contracts for similar services
- Identify "best in class" solutions and industry benchmarks

Devising a Pre-Solicitation Process to Access Solutions Ideas

- Requests for information, industry days and pre-solicitation conferences: when and how to use them

Documenting and Reviewing Market Research

- Requirements pursuant to FAR Part 10

DAY TWO

Structuring Your Acquisition to Provide for Collaborative Solutions Development

- Options for engaging individual or multiple vendors in collaborative solutions development
- Using a down-select process for solutions development

Establishing and Maintaining Collaborative Communications with Vendors

- Create an open and innovative dialogue with solution providers
- Maintain confidentiality of vendor's innovations

Dialogue and Collaboration on the Technical Proposal

- Understand the core competencies and value-added nature of a vendor's solution
- Align government capabilities and vendor capabilities into a synergistic solution

Dialogue and Collaboration on Structuring Incentives

- Create incentives that reward vendors and push for continuous improvements

Establishing and Evaluating Relationship Management Between Government and a Possible Vendor

- Create a "Relationship Management Plan" to guide the implementation of a shared solution

Intellectual Property Considerations in Joint Government-Industry Solutions

- Overview of FAR intellectual property requirements

ACQUISITION PERFORMANCE

Monitoring and Managing Contract Performance

A key issue in contract management is the monitoring of the supplier's performance to ensure all standards are met in accordance with the contract. The extent of performance monitoring applied to a supplier should be determined by the level of risk involved in the purchase and the nature of the goods or services provided. Good monitoring of contractor performance progressively anticipates, identifies and facilitates correction of shortcomings before the relationship with the supplier is adversely affected and before value for money is compromised. In this course you will learn how to deal with these challenges by establishing and maintaining a performance based contract management strategy from initial offer to closeout and payment.

This training will focus on developing a strong understanding of the issues involved, and development of, performance based contracting. In this course you will acquire the ability to prospect risk, administer accountability and negotiate payments all throughout the contract lifecycle.



COURSE AVAILABILITY AND CREDITS

December 12-13, 2005 in Arlington VA (Code: C157)
April 13-14, 2006 in Arlington VA (Code: C154)
September 7-8, 2006 in Arlington VA (Code: C1002)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE **Earn 12 CPEs**
CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Understanding Federal Integrity Statutes and Regulations in Government

- Learn to conscientiously attend to the details involved in investigating allegations of fraud and other wrongdoing
- Understand FAR regulations, agency supplemental and contract rule agreements

Governing for Performance Based Contract Management

- Provide the contractor an accurate review of the contract milestones and responsibilities
- Document each issue and it's resolution in a post award conference report

Devising Measures that Demonstrate Contract Performance Status

- Identify the performance-related terms and conditions of the contract
- Monitor contract performance and acceptance and resolve any identified problems

Establishing Clear Lines of Communication between Contract and Team

- Minimize the impact of contractor performance problems on performance, delivery and cost

Confronting Contract Modifications and Adjustments

- Negotiate an equitable adjustment when necessary for the acquisition situation
- Establish negotiation objectives and tradeoffs based on available information

DAY TWO

Ongoing Risk Management

- Interpret contracts and recognize terms and conditions that protect or threaten you
- Apply risk management techniques to all property administration functions

Monitoring Contract Performance

- Develop metrics to assure the contractor complies with all the requirements in the contract
- Identify performance problems and determine whether they are excusable, non-excusable, or commingled

Dealing with Performance and Alternative Dispute Resolutions

- Correctly determine the validity of the claim and prepare a proper and complete response
- Treat the contractor fairly and equitably within the terms of the contract

Administering Payments and Incentives

- Make decisions related to allow-ability of contract costs
- Assure that payments are not made for unallowable costs

Managing Contract Closeout

- Assure that the contract is physically complete and all outstanding contract administration issues have been resolved

Reporting Performance

- Identifying best practices through post project review and lessons learned

CONTRACT PROJECT MANAGEMENT

Project Management for Government Procurement

Government is now more results-oriented at the federal, state and local level, particularly in the way government contracts are written and managed. Effective project procurement management is critical to delivering increased productivity and enhanced results in government contracts. Now, under the Federal Acquisition Regulation as well as in the OMB Exhibit 300 and the Clinger Cohen Act, project management is a requirement for most contract types. Attend this course to walk through each stage of the procurement life-cycle, from project planning and initiation to monitoring and reporting.

This training will focus on proven government project procurement methodologies aiming to improve planning, execution and performance throughout all critical stages of the contract life-cycle, from developing a project procurement plan to standards for closing a project. In addition, attendees will learn key techniques to master the development and communication of contract requirements, a fundamental and challenging project procurement management skill.

CRITICAL ELEMENTS OF THE PROJECT PROCUREMENT MANAGEMENT PROCESS



COURSE AVAILABILITY AND CREDITS

September 19-20, 2005 in Arlington, VA (Code: T1010)
November 29-30, 2005 in Arlington, VA (Code: T207)
April 10-11, 2006 in Arlington, VA (Code: T210)
August 30-31, 2006 in Arlington, VA (Code: T1000)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

Project Management Institute ® R.E.P. **Earn 13.25 PDUs**

CPE **Earn 13 CPEs** CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Updates on the Latest Project Procurement Management Mandates and Guidance in Government
- Understand new Federal Acquisition Regulations and identify the need for and application of Earned Value Management (EVM)
- Understand how contract types, dollar thresholds, and life-cycle stages require EVM or Operational Analysis under federal policy
- Examine contracting requirements in OMB's Exhibit 300 and the Clinger-Cohen Act

Advancing Procurement Integrity Awareness
- Examine ethical issues, review agency policies and implement standards for corresponding with potential solutions providers
- Understand the culture of heightened sensitivities surrounding project procurement and contracting officers

Developing, Evaluating and Validating Contract Requirements
- Learn key techniques to negotiate and communicate project requirements with senior leadership
- Validate, prioritize and assess key requirements based on customer needs and project goals
- Gain stakeholder and contractor consensus for final project specifications

Planning the Project Contract
- Identify service, product and performance criteria for the contract
- Develop an integrated procurement management plan and associated documentation

Designing a Contract Statement of Work
- Create a SOW based on project scope, contract requirements and the Work Breakdown Structure
- Learn key writing and communication techniques for SOW development

Creating Effective Partnership Agreements
- Determine advantages of partnering to achieve project objectives
- Develop a performance-based partnership agreement

DAY TWO

Monitoring and Reporting Contract Performance Information
- Implement standards for data collection and report on contractor obligations
- Calculate project earned value to determine cost and schedule variables

Managing the Contract
- Administer interfaces and requirements between different providers and project partners using a quality control system
- Implement change control standards that result in effective corrective actions

Closing the Contract
- Review final contractor performance against project deliverables and stated requirements
- Ensure final project results are documented and verifiable to withstand litigation and potential audits

Case Study: Administering a Successful Contract using Earned Value Management
- Establish an EVM system that integrates with the program to manage government contracts
- Monitor and manage the contract to ensure the project remains within acceptable limits for cost, schedule and performance

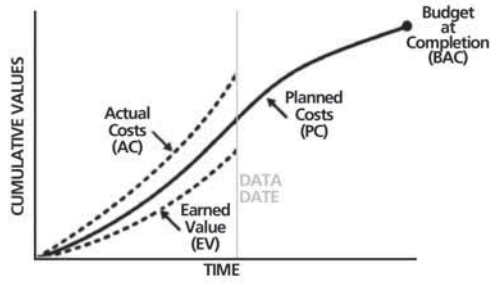
Application Workshop: Create a Procurement Management Plan
- Implement a procurement management plan to manage multiple service providers from the project initiation phase to the closeout phase
- Establish protocols for contract documentation and develop project requirements
- Delegate responsibility for make-or-buy decision, contract selection, schedule development and cost control to the project team

Earned Value Project Management

Earned Value Management (EVM) is a key tool used to track, measure, and report project performance and prevent cost and schedule overruns. In addition to being one of the central requirements for "Getting to Green" on the President's Management Agenda, now the Federal Acquisition Regulations, require agencies to implement EVM standards for most contracts as well as criteria for receiving a passing score on the OMB Exhibit 300. Implementing EVM across your agency's project portfolio also allows managers useful, prompt and verifiable data for assessing achieved efficiencies. Also, learn data analysis techniques to demonstrate a positive impact on program results.

By attending this course, you will receive the latest tools for not only reporting project data, but also managing project performance and integrating teams. By following a comprehensive 7-step process for Developing and Using Earned Value Management Systems (EVMS), attendees will acquire the latest tools and methodologies to ensure your project remains within cost, schedule and performance requirements. This time tested methodology walks through each stage of implementation of EVMS and delineate the use of the most cutting edge methodologies.

EARNED VALUE PERFORMANCE REPORTING



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COURSE AVAILABILITY AND CREDITS

August 29-30, 2005 in Arlington, VA (Code: P489)
October 6-7, 2005 in Las Vegas, NV (Code: P509)
February 9-10, 2006 in Arlington, VA (Code: P555)
June 8-9, 2006 in Arlington, VA (Code: P556)
September 21-22, 2006 in Las Vegas, NV (Code: T220)

Open Enrollment:
Course Level: Beginner
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

Project Management Institute R.E.P.® Earn 12.5 PDUs

CPE Earn 12 CPEs CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Updates on the Latest Earned Value Management Mandates and Guidance in Government

- Learn requirements for using EVM to "Get to Green" on the President's Management Agenda
- Receive updates on EVM mandates including the Federal Acquisition Regulations, Clinger-Cohen, OMB Circular A-11 and the Exhibit 300
- Explore OMB and agency-specific changes in policy and standards for EVMS

Earned Value Management Overview: Methodologies, Tools and Terminology

- Define roles, develop necessary skills and identify competency gaps
- Understand the potential impact of using EVMS and explore the latest project tracking tools
- Define the use of EVMS across various organizational functions and contract types

Developing and Using Earned Value Management Systems

Step 1: Define and Charter the Project

- Determine project goals, strategies, objectives and scope
- Garner support and resources from project stakeholders

Step 2: Integrate the Work and the People

- Link your Work Breakdown Structure to critical organizational structures with measurable deliverables
- Align performance objectives among stakeholders and project partners

DAY TWO

Step 3: Authorize the Project Plan

- Gain consensus on planned budget, cost and performance targets
- Maintain project objectives through effective change management

Step 4: Track and Manage Project Performance

- Learn effective techniques for tracking progress and adapting to unplanned obstacles
- Identify project milestones and apply performance-based incentives

Step 5: Analyze and Report Project Metrics

- Measure and report project cost, schedule and performance
- Understand key techniques and project management tools to improve performance reporting

Step 6: Controlling and Saving the Project Baseline

- Understand earned value calculation techniques and implications
- Use data from past projects to develop strategies for project improvement

Step 7: Maintaining the Performance Baseline

- Utilize effective tools for calculating risk-adjusted ROI
- Link risk assessment to capital planning and investment management

Application Workshop: Using Earned Value in Project Management

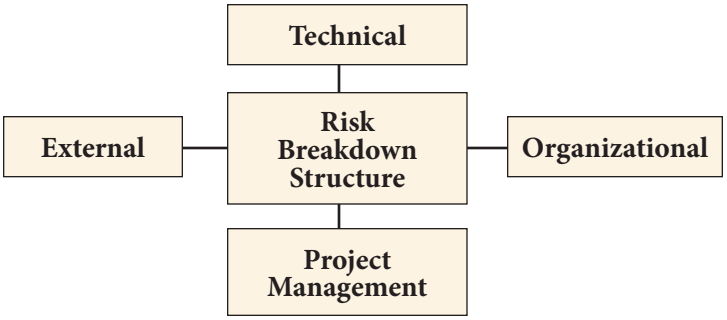
- Develop schedule, budget and performances requirements for a project plan
- Use Earned Value analysis for strategic decision-making
- Exchange best practices in addressing current project challenges in a peer-to-peer solutions exchange

Managing Project Risk

The management and analysis of project risk is essential to completing a successful project. The Federal Acquisition Regulations and the Defense Acquisition Regulations require that project managers account for risk in most types of government contracts. Additionally, OMB has mandated that IT project managers explain potential project risks and provide mitigation plans in the Exhibit 300 in order to stay off their IT "watch list" and ensure maximum funding. Project risk must be evaluated, tracked and communicated to senior management, stakeholders and customers. In the course, learn both an individual and enterprise approach to risk management.

Managing Project Risk in Government provides project managers with key techniques and methodologies needed to identify, assess, measure and mitigate project risk. Attendees will utilize the latest management tools including Risk Management Life-Cycle Framework, PMBOK® Risk Management Knowledge Area, Risk Monitoring and Control Tables, Risk Breakdown Structure, and Risk-Adjusted Return on Investment Charts to improve the management of risk. By developing a Risk Response Plan as detailed in the PMBOK®, attendees will understand the differences in risk throughout the entire project lifecycle.

RISK BREAKDOWN STRUCTURE FOR GOVERNMENT PROJECTS



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COURSE AVAILABILITY AND CREDITS

October 5-6, 2005 in Las Vegas, NV (Code: P511)
October 20-21, 2005 in Arlington, VA (Code: P490)
February 8-9, 2006 in Arlington, VA (Code: P553)
June 7-8, 2006 in Arlington, VA (Code: P554)
September 20-21, 2006 in Las Vegas, NV (Code: T221)

Open Enrollment:
Course Level: Beginner
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

Project Management Institute R.E.P. Earn 12.5 PDUs

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COURSE AGENDA

DAY ONE

Updates on the Latest Risk Management Mandates and Guidance in Government

- Review emerging trends and standards for risk management
- Receive updates on the Federal Acquisition Regulations, OMB Circular A-11, Exhibit 300, Clinger-Cohen and the most recent GAO "High-Risk" report
- Learn key techniques for integrating project risk management plans into cost-plus contracts and IT projects

Risk Management Overview: Methodologies, Tools and Terminology

- Define roles, develop necessary skills and identify competency gaps
- Understand its importance and learn key risk management techniques
- Explore the latest challenges in managing government projects in a "high-risk" environment

Understanding Risk within the Project Life-Cycle

- Identify and mitigate potential elements of risk in each phase of the life-cycle
- Learn common risks for each stage and integrate them into the risk management plan

Key Techniques for Effective Risk Management Planning

- Create a Risk Breakdown Structure
- Develop risk deliverables and communicate mitigation strategies to project stakeholders

Identifying Project Risk

- Determine and prioritize risks that threaten project performance
- Construct strategies to overcome or mitigate risks

DAY TWO

Implementing "Tough" Metrics: Quantifying Project Risk

- Establish effective metrics for measuring risk
- Evaluate potential impact on cost, efficiency and performance goals

Integrating Risk into Project Tracking and Reporting

- Update management on project risk impacting critical mission goals
- Track risk trends and mitigation factors using Earned Value Management

Planning and Managing Risk Response

- Link each identified risk with a strategic response
- React rapidly to resolve unplanned project obstacles

Integrating Risk into Return on Investment Analysis

- Utilize effective tools for calculating risk-adjusted ROI
- Link risk assessment to capital planning and investment management

An Enterprise Approach to Risk Management: Developing an Enterprise Risk Profile

- Determine enterprise behaviors and trends in managing risks
- Establish a single framework to consolidate risk management processes in multiple projects

Application Workshop: Developing a Risk Management Plan

- Design a comprehensive risk management plan using a step-by-step process
- Create a strategic framework for identifying, monitoring and mitigating project risk

Managing Project Teams

Project success often hinges solely on the quality and productivity of your project team. An essential part of project management and planning, the OPM 2200 Series and CIO Council Project Manager Guidance outlines key competencies essential to a high-performing project team. In this course, master critical strategies for designing an effective project team, administering competency development, negotiating conflicts and managing diversity.

This course will take attendees through proven strategies for the development and management of government project teams, resulting with a proven framework for establishing the key players needed for an integrated project team. Based on the analysis of your project team using the *Myers-Briggs Type Indicator* (MBTI®), this course aims to develop key strategies for development of a qualified, efficient and streamlined project team.

PROJECT TEAM MANAGEMENT PROCESS FLOW DIAGRAM



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COURSE AVAILABILITY AND CREDITS

November 14-15, 2005 in Arlington, VA (Code: T206)
March 15-16, 2006 in Arlington, VA (Code: T211)
July 13-14, 2006 in Arlington, VA (Code: T1001)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

Project Management Institute R.E.P. **Earn 13 PDUs**

CPE **Earn 13 CPEs** CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Overview of Competencies for the Ideal Government Project Team
- Identify key differences and advantages for each type of project team
- Explore the latest project management tracking tools
- Examine government-wide best-practices in team development, leadership and management

Developing and Integrating Organizational and Work Breakdown Structures (WBS)
- Integrate the organizational functions into your WBS
- Link measurable deliverables in your WBS to critical organizational and workforce structures

Planning Your Project Team
- Align your project team requirements with current organizational structures and government standards
- Establish a virtual project team aligned with project requirements and goals

Acquiring Your Project Team
- Assess project human capital needs and negotiate staff assignments with senior leadership
- Determine potential cost-efficiencies of acquiring external services using strategic sourcing

Aligning Workforce Competencies to Project Requirements and Risk
- Perform a gap analysis to determine training and developmental needs
- Examine core competencies outlined by OPM and the CIO Council

Managing a Diverse Project Team: Improving Communication Through Effective Workforce Analysis
- Assess your project team using the *Myers-Briggs Type Indicator* (MBTI®)
- Learn key techniques for effective diversity management

DAY TWO

Managing and Resolving Conflicts
- Examine lessons learned in successful conflict resolutions
- Manage pre-established biases and emotions using proven negotiation and influencing techniques

Improving Team Decision Making
- Delegate responsibility not authority to team members
- Communicate problem solving strategies to reach final consensus

Conducting Vital Project Meetings
- Create guidelines establishing the vital-few meetings for development, review and training
- Plan and execute effective steering committee meetings

Tracking and Reporting Team Performance
- Manage and track team performance using Earned Value
- Design standards for collecting and reviewing project performance information

Case Study: Developing High-Performing Project Teams
- Explore lessons learned from managing and developing project teams in government
- Determine best practices for ensuring project success through effective management of the project workforce

Application Workshop: Simulation-Based Project Team Management for Complex Projects
- Simulate a real life project scenario through each stage of the project life-cycle in a group exercise
- Respond to practical obstacles involved in managing project teams
- Participate in an instructor-lead critique of group results and receive recommendations for future improvement

ENTERPRISE SOURCING STRATEGY

Strategic Sourcing for Government

Governmental agencies are under extreme pressure to drive down costs, improve efficiency and leverage every taxpayer dollar for maximum benefit. In recent years, many governmental departments have coped with mandated or legislated budget cuts, increasing the sense of urgency, relevance and necessity of supplier management to control costs and manage performance. Harnessing Value in the supply chain through strategic sourcing is OMB's response to these extreme pressures. Strategic sourcing is defined as "the collaborative and structured process of critically analyzing spending and using this information to make business decisions about acquiring commodities and services more effectively and efficiently." Take this course and learn how the unique buying power of the government can be used to leverage increased cost effectiveness and better supply chain performance.

This training will focus on developing a strategic sourcing initiative that you can us in your agency. Participants in this course will walk away knowing how to assess potential buying sources, establish strategic sourcing goals, develop performance measures and analyze purchases. In addition, attendees will learn key techniques to master relationship development with vendors and communication of contract requirements – fundamental and challenging procurement management skills.

COURSE AVAILABILITY AND CREDITS

February 8-9, 2006 in Arlington, VA (Code: C1010)
July 19-20, 2006 in Arlington, VA (Code: C1011)

Open Enrollment:
Course Level: Beginner
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

CPE Earn 12 CPEs
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COURSE AGENDA

DAY ONE

Updates on Government Strategic Sourcing Requirements

- Update on the latest strategic sourcing mandates and best practices from the Office of Management and Budget
- Use a "strategic sourcing" process to acquire commodities and services more effectively and efficiently

Developing Your Strategic Sourcing Initiative: Assembling a Team and Developing a Plan

- Develop a "team charter" that aligns outsourcing goals with agency mission
- Ensure effective collaboration between key stakeholders
- Clearly identify and define the roles and responsibilities of all participants, including vendors

Establishing Strategic Sourcing Goals, Objectives and Performance Measures

- Determine desired outcomes, strategies and performance measures
- Align operational goals with business strategies
- Balance cost and performance goals with socio-economic goals

Selecting Strategic Sourcing Commodities: Conducting an Analysis of Your Purchases

- Conduct commodity spend analysis to identify how much is being spent for specific goods and services
- Analyze the data to identify opportunities to reduce costs and improve service levels
- Examine information on an ongoing basis, using standard reporting and analytical tools

DAY TWO

Developing a Communications and Change Management Strategy

- Include communication strategy that conveys management's commitment to the strategic sourcing effort
- Identify any organizational changes and ensure that agency employees are aware of awarded strategic sourcing contracts and how they are to be used
- Educate agency personnel to support effective and efficient strategic sourcing implementation and management

Assessing Potential Supply Sources

- Identify current, alternative and nontraditional suppliers
- Perform supplier assessment and comparison
- Ensure socio-economic groups are represented among potential suppliers

Implementing Your Strategic Sourcing Process: Soliciting Bids and Negotiating With Suppliers

- Identify a diverse pool of potential vendors
- Examine conflict of interest areas and ensure a level playing field
- Utilize a best value approach using weighted criteria

Application Session: Mock Commodity Team Exercises

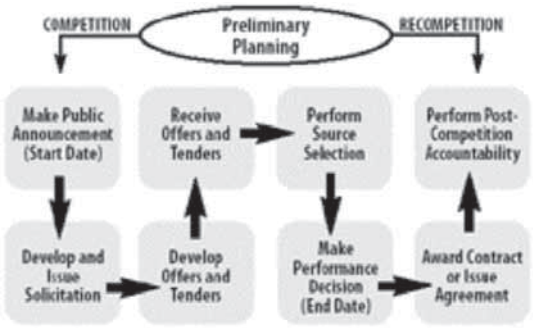
- Hands-on Exercise: Designing strategic sourcing plans
- Identify commodities that could be strategically sourced
- Apply methodologies for spending and benefit analyses

Managing Competitive Sourcing

Competitive sourcing aims to increase efficiency and improve performance, but many agencies still lack adequate training necessary to achieve these goals. Continuous changes to A-76, OMB's guidance circular for managing public-private competitions, and legislation make it difficult for agency employees to stay on top of the rules of the game. Agencies need to acquire proper training in order to successfully fulfill their responsibility in the A-76 process.

In this course, you will learn to develop a comprehensive strategy for competitive sourcing and conduct A-76 compliant competitions that are critical to achieving cost efficiency and performance effectiveness success in your agency.

THE STANDARD COMPETITION PROCESS



COURSE AVAILABILITY AND CREDITS

December 1-2, 2005 in Arlington, VA (Code: C149)
March 9-10, 2006 in Arlington, VA (Code: C1003)
June 26-27, 2006 in Arlington, VA (Code: C155)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
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COURSE AGENDA

DAY ONE

Update: Directives and Developments Affecting the Competitive Sourcing Initiative

- Understand the latest from the Office of Federal Procurement Policy and Circular A-76
- Assess "standard" versus "streamlined" competitions and the new rules of competitive sourcing

Step 1: Establish the Competitive Sourcing Team and Infrastructure

- Clearly identify and define the roles and responsibilities of the Agency Team and Source Selectio
- Create the right infrastructure in order to develop and implement a successful competitive sourcing process in your agency

Step 2: Determine Jobs for Competition

- Classify jobs as "inherently government" or "commercial" under the FAIR Act
- Understand the role of human resources in the competitive sourcing process

Step 3: Select Appropriate Competition Method

- Examine how rules regarding the streamlined and standard competitions method can benefit your agency
- Discuss which competition method better suits agency objectives

Step 4: Establish and Conduct Competition Plan

- Begin Performance Management planning by identifying the key processes to be used in your competition
- Establish a continuing communication and training plan for agency employees

Step 5: Make Public Announcement

- Devise an announcement which includes what, where, when and why the agency is conducting the competition
- Notify affected employees and parties of the competition

DAY TWO

Step 6: Appoint and Train PWS and Most Efficient Organizations (MEO) Teams

- Select individuals for managing both the PWS and MEO teams and assign roles and responsibilities
- Understand the rules of competitive sourcing and the issue of "firewalls" and tackle potential conflicts of interest

Step 7: Develop PWS and Quality Assurance Surveillance Plan (QASP)

- Identify the desired level of performance expected and develop PWS which focuses on outcomes, rather than outputs
- Establish measures in order to maintain continued performance management during the life of contract

Step 8: Prepare Government Tender

- Organize a MEO that has functional and managerial expertise

Step 9: Evaluate and Select

- Conduct a cost comparison using the COMPARE software
- Understand the roles and responsibilities of the Source Selection Authority (SSA) and learn to apply "best value" criteria

Step 10: Monitor and Manage Performance

- Establish a clear line of performance objectives and measures to ensure service provider accountability
- Develop strategies for developing and implementing a performance reporting and surveillance system

ENTERPRISE SOURCING STRATEGY

Structuring and Measuring a Most Efficient Organizaion (MEO) for A-76 Competitions

Under the FAIR Act of 1998, federal agencies are mandated to inventory all activities that are performed by government employees that can potentially be outsourced. The President's management agenda urges federal agencies to compete functions that are commercial in nature. The Most Efficient Organization (MEO) is management's "bid" to perform one of these activities. To be competitive with private industry, the team responsible for developing the MEO must design a streamlined, more efficient work organization than is in place today. This training will deliver an in-depth look at structuring and measuring an MEO for A-76 competitions.

Attend this interactive forum to ensure your agency is equipped with innovative, comprehensive practices needed to create and manage a successful MEO. Participants will walk away with a clear understanding of the purpose, goals and objectives in developing and managing an MEO. Participants will furthermore walk through the MEO process and acquire a firm knowledge of each step from building an able-bodied team to the post MEO performance review.

COURSE AVAILABILITY AND CREDITS

January 11-12, 2006 in Arlington, VA (Code: C1006)
June 14-15, 2006 in Arlington, VA (Code: C1007)

Open Enrollment:
Course Level: Beginner
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

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COURSE AGENDA

DAY ONE

Overview of Most Efficient Organization (MEO) Mandates and Guidelines in Government

- Determine how to classify activities as either inherently governmental or commercial as mandated under the FAIR ACT
- Understand the connection and importance of the Performance Work Statement (PWS)

Learn the Purpose, Goals and Objectives of the MEO

- Discover how your agency can obtain a "Green" on your PMA scorecard with an MEO
- Utilize management, technical staff, workload analysis and observations of current operating procedures

Learn to Effectively Develop an Able-Bodied MEO Team

- Identify the critical skills needed and learn how to get employees involved in the process
- Use multi-skilled positions and performance milestones

Understand the Role of the Agency Tender

- Learn the relationship between OMB Circulars A-94 and A-76 in making cost decisions for the agency tender
- Remain in accordance with solicitation requirements

Integrate with the Performance Work Statement (PWS) and Management Plan (MP)

- Learn about the "In House Cost Estimate" and the associated documents in the management plan
- Develop key measurement controls that will enhance contractor performance

DAY TWO

Developing the Technical Performance Plan

- Describe how the MEO will perform the work requirements in the PWS
- Realize internal weaknesses in the MEO and understand which areas need assistance

Learn to Calculate the Cost of Public-Private Competitions

- Learn the policy and purpose of the A-76 process and the difference between streamlined and standard competitions
- Find out about costing rules and the widely used software tool COMPARE

Linking the MEO with Continuing Government Activity (CGA)

- Understand the purpose and scope of activities of the CGA staff
- Understand the benefits of early establishment and communication with the CGA

Create and Implement an MEO Transition Plan (TP) that Successfully Shifts away from the Current Organization

- Learn to manage the many transition details, including equipment turnover, training, inventory and procedural changes
- Ensure fairness for employees and assist with transition events in the reduction of force process

Examine the Effectiveness of the MEO Process with a Post MEO Independent Performance Review

- Ensure the MEO has been implemented in accordance with the transition plan
- Confirm that costs are within the estimates contained in the in-house estimate

Project and Acquisition Planning for A-76 Competitions

Deciding what work to outsource, or privatize, and how to do it successfully can be difficult. In identifying outsourcing opportunities, government decision makers must balance the potential for cost savings associated with using private sources against the need to preserve "core" or "inherently governmental functions." Moreover, when transferring significant work from public to private entities, agencies must follow certain procedures for measuring and evaluating outsourcing opportunities. Once a decision has been made to outsource, agencies must structure the transaction to meet the government's need and to provide sufficient incentives to the contractor to produce the desired results. Participants in this training will learn to comply with OMB mandates and stay on top of the latest changes to A-76 policy and be aware of the best in practice methods by other agencies during A-76 lifecycle.

In this training you will learn and review the foundation behind competitive sourcing in government. Participants will master critical steps in the A-76 competition process, such as the performance work statement (PWS) and management plan. Finally, develop strategies for creating and implementing a performance reporting and surveillance system.

COURSE AVAILABILITY AND CREDITS

February 6-7, 2006 in Arlington, VA (Code: C1008)
July 17-18, 2006 in Arlington, VA (Code: C1009)

Open Enrollment:
Course Level: Beginner
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
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COURSE AGENDA

DAY ONE

State of Practice, Mandates and Guidelines for Competitive Sourcing in Government

- Understand the latest from OFPP, as well as legislation effecting competitive sourcing implementation
- Improve and align your agency with the FAIR ACT of 1998

Competitive Sourcing Overview: Methods, Tools and Terminology

- Clearly identify and define the roles and responsibilities of the team
- Determine the most cost effective method of obtaining services that are available in the private sector

Government Performance Acquisition Model

- Enterprise Sourcing Strategy
- Government Business Case
- Most Efficient Organization
- FAR & A-76 Competitions
- Transition Phase
- Contract Management

Classify Business Action and Make a Public Announcement

- Identify jobs as "inherently governmental" or "commercial" under the FAIR Act
- Learn to avoid conflicts of interest

Developing the Performance Work Statement (PWS) and Quality Assurance Surveillance Plan (QASP)

- Identify the desired level of performance expected and focuses on outcomes, rather than outputs
- Establish measures to maintain continued performance management during the life of the contract

Preparing and Issuing Solicitation that Identifies Performance Expectations

- Learn the different types of contracts used and which best works for your agency
- Devise an announcement which includes what, where, when and why the agency is conducting the competition

DAY TWO

Developing the Management Plan

- Develop organizational structures, staffing and operating procedures, equipment and other aspects of the MEO
- Develop an In-House Cost Estimate

Comparing and Evaluating Government and Contractor Proposals

- Conduct a cost comparison using the COMPARE software

Performing the Independent Review

- Understand the role of the Independent Review Official
- Develop and organize all supporting documentation

Evaluating and Selecting Contractor Proposals

- Measure which source that is best able to provide the service and ensure the competition is conducted fairly
- Assess whether the offers proposed will provide the necessary level of performance and quality sought after

Monitoring and Managing Performance

- Establish a clear line of performance objectives and measures to ensure service provider accountability
- Develop strategies for developing and implementing a performance reporting and surveillance system

Ethics in Government Contracting

Contracting ethics span many areas of law, including criminal law, civil fraud laws and ethics rules for government employees. Under the Federal Acquisition Regulation (FAR) and its counterpart in defense, government employees are held to rules that govern procurement ethics that reflect the endless legal, moral and political reality of the day-to-day procurement process. As a result, the procurement integrity rules are startlingly complex, and require careful review for compliance. In this course you will learn how to deal with these challenges and how to practice proper ethical decision making during the contracting process.

This training will focus on developing a strong understanding of the issues involved, and area of laws in, federal contracting. By understanding the complexity of laws, government officials will be able to walk away confident that they can practice high levels of ethical conduct and integrity awareness. In this course you will acquire the ability to avoid fraud, employee misconduct and improper gift giving and receiving violations.

COURSE AVAILABILITY AND CREDITS

January 26-27, 2006 in Arlington, VA (Code: C159)
April 10-11, 2006 in Arlington, VA (Code: C1013)

Open Enrollment:
Course Level: Beginner
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
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CPE Earn 12 CPEs
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COURSE AGENDA

DAY ONE

Discover Latest Mandates, Guidance and Standards for Contracting Ethics in Government

- Understand and comply with the Federal and Defense Acquisition Regulations and the OMB circular A-76
- Learn ethics standards applicable to recent federal, state and local contract litigation

Contracting Ethics and Integrity Awareness Overview

- Determine and examine key ethics and integrity issues common to government agencies
- Establish procurement integrity in your agency through effective awareness training

Developing Standards of Ethical Conduct for Government Employees

- Determine when and how to give ethics advice on misuse of position and impartiality
- Explore pertinent contractor-employee procurement integrity issues and how to avoid them

Enhancing Employee Ethics Awareness in the Procurement Process

- Leverage employee awareness in government ethics to avoid organizational conflicts of interest (OCI)
- Examine statutes and lessons learned from previous OCI prosecutions

Manage Employees with an Understanding of Federal Acquisition Regulations and other Complex Area of Laws

- Understand and manage the intricate area of gift giving and receiving and avoid violations
- Learn how the Hatch Act impacts employee office and personal activities

DAY TWO

Ensure Proper Handling of Privileged Information for Public Disclosure Reports

- Learn specifications issued by the Office of Management and Budget (OMB) regarding restrictions on information disclosure
- Craft guidelines for ensuring and maximizing the quality and integrity of information provided to the public in the FOIA

Acquire Key Techniques for Working with Federal Contractors

- Learn to clearly identify contractor status in e-mails, phone calls and meetings

Responding to Employee and Contractor Misconduct

- Determine contract standards for identifying and characterizing the severity of misconduct
- Identify legal risks and align your agency with proper reporting techniques

Learn to Identify and Avoid Contractor Fraud

- Evaluate the need to prepare proper financial disclosure reports and avoid conflicts of interests
- Ensure that you fully understand applicable FAR and regulatory requirements

Delivering Accountability and Transparency to Government Auditors and Agency Ethic Offices

- Align with agency with the OGE ethics program and ensure compliance
- Learn to develop and enhance communication with ethics officials with a high degree of responsiveness

Leadership Strategies for the Public Sector

The key to project success today is to develop strategies for leading people and change within the organization. Circumstances and persistence are major components in the developmental process of any leader. The project managers of today must possess traits which will help them motivate others and lead them in new directions. They must also be able to envision the future and convince others that their vision is worth following. At this interactive training, you will walk through OPM's *Executive Core Leadership Qualifications* and understand your leadership style and characteristics.

This training will focus on developing leadership strategies for acquisition managers by applying OPM's *Executive Core Leadership Qualifications* as a template for becoming a leader in your agency. Through the establishment of this template, government project managers will be able to drive performance and accountability through their organization and deliver enhanced impact on project results.

THE OPM EXECUTIVE CORE LEADERSHIP QUALIFICATIONS INCLUDE:

ECQ 1: Leading Change
ECQ 2: Leading People
ECQ 3: Results Driven
ECQ 4: Business Acumen
ECQ 5: Building Coalitions/Communications

COURSE AVAILABILITY AND CREDITS

December 19-20, 2005 in Arlington, VA (Code: P1001)
March 13-14, 2006 in Arlington, VA (Code: P560)
September 18-19, 2006 in Arlington, VA (Code: P1002)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

Project Management Institute R.E.P. Earn 12.5 PDUs

CPE Earn 12.5 CPEs CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Executive Leadership Mandates and Trends
- Understand OPM's Executive Core Leadership Qualifications
- Explore leadership lessons and styles from the federal, state and local levels

Defining Leadership Mission and Agency Outcome Goals
- Consider a vision statement with organizational values and principles
- Establishing outcome goals to drive organizational results

Assessing Leadership Needs
- Develop a comprehensive understanding of your strength as a leader
- Gauge how management style supports or undermines strength building behaviors that lead to employee engagement and performance

Devising a Leadership Development Plan
- Devise and implement an effective leadership performance strategy that maximizes your credibility as a leader
- Create an action plan to develop a more unified relationship with your staff

Establishing Leadership Competencies
- Determine core leadership competencies needed for optimum agency performance
- Improve personal awareness and create an office culture that strives for results

Managing Conflict
- Evaluate risk and assess the critical elements of change
- Ensure your organization can sustain change by building individual resilience

DAY TWO

Implementing OPM's Executive Core Leadership Qualifications

Leading Change
- Identify and integrate key issues affecting the organization
- Exercise leadership and motivate managers to incorporate vision
- Be open to change and new information

Leading People
- Inspire, motivate and guide others in goal attainment
- Develop an effective performance management system
- Implement a cultural diversity program

Driving Results
- Understand linkage between administrative competencies and mission needs
- Formulate strategic program plans that assess program feasibility
- Set program standards

Developing Business Acumen
- Assess staffing needs based on organizational goals
- Establish the use of internal controls for financial systems
- Integrate and coordinate logistical operations

Building Coalitions
- Develop and enhance alliances with external groups
- Establish and maintain working relationships with internal organizational units

Improving Communication
- Facilitate an open exchange of ideas
- Develop a plan to reflect the position and work of the organization in a clear, convincing and organized manner

Business Analysis and Critical Thinking

Successful organizations must acquire the skills to improve decision-making and problem-solving using effective business analysis and critical thinking techniques. Developing key decision-making skills such as problem scoping, creativity, influencing and reasoning delivers a tangible impact on business value and organizational performance. In this course, develop the skills necessary to drive and justify decision making in your organization by actively leveraging your personal thinking profile and the styles of those in your organization.

Attend this training to ensure your decisions result in enhanced project value and not unintended consequences. Master strategic problem solving by fully leveraging creativity in your organization, and by understanding key elements of the business environment essential to accelerating resolutions.

THE BENJAMIN BLOOM KNOWLEDGE TAXONOMY MODEL®

EVALUATION
SYNTHESIS
ANALYSIS
APPLICATION
COMPREHENSION
KNOWLEDGE

Source: Taxonomy of Educational Objectives, Handbook 1: Cognitive Domain, Benjamin Bloom

COURSE AVAILABILITY AND CREDITS

December 15-16, 2005 in Arlington, VA (Code: P1004)
May 11-12, 2006 in Arlington, VA (Code: P562)
September 5-6, 2006 in Arlington, VA (Code: P1005)

Open Enrollment:
Course Level: Intermediate
Prerequisites: None
Format: Group Live
Advanced Preparation: None
Tuition: $1095
[Group and Certification Discounts Available]

In-House Training:
$7500 per day for two days; maximum attendance 40
Contact the Institute to discuss customizing an in-house version of this class

Project Management Institute R.E.P. Earn 13 PDUs

CPE Earn 13 CPEs CONTINUING PROFESSIONAL EDUCATION

COURSE AGENDA

DAY ONE

Understanding the Relationship: Business Analysis and Critical Thinking Overview for Government

- Learn the impact of applied critical thinking skills and business analysis on driving decision-making
- Explore key methodologies, tools and terminology in the practical application of critical thinking and business analysis

Analyzing Key Thinking Styles

- Analyze your personal thinking style and its impact on decision-making
- Utilize the Benjamin Bloom Knowledge Taxonomy Model® to identify key thinking profiles and patterns in your work environment

Establishing Influence on the Organization

- Learn key techniques for influencing support and decision-making in all levels of the organization
- Manage thinking preferences using the Herrmann Brain Dominance Instrument™ (HBDI)

Identifying Dispute, Conflict and Reasoning Structures

- Identify workforce and regulatory trends resulting in formal employee complaints
- Use effective reasoning and mediation as a vehicle to accelerate workforce resolutions

Developing and Implementing an Innovation Initiative

- Understand the roles, systems, and stakeholders involved in establishing an effective innovation initiative
- Examine strategies to eliminate organizational and procedural barriers to innovation

DAY TWO

Leveraging Group Creativity for Solution Development

- Explore brainstorming and enhance communication techniques to foster group creativity
- Determine the potential impact of creativity on generating a solutions-oriented culture

Applying Business Analysis Techniques

- Apply business analysis techniques to communicate the impact of your work
- Examine unintended consequences of potential solutions on organizational performance

Scoping the Problem and Expediting the Resolution

- Utilize problem scoping techniques to frame the obstacles and plan the resolution
- Utilize decision-making protocols to expedite solutions and reduce time lost on resolving problems

Application Workshop: Utilize Business Analysis and Critical Thinking to Adapt to Unplanned Problems

- Walk through the business analysis process to articulate the impact of problem-solving on critical business needs
- Apply practical creativity and innovation techniques in the decision-making process
- Improve decision making by assessing organizational impact of resolution

All Institute Courses Can Be Delivered On-Site For Your Team!

Performance Measurement and Evaluation

- Strategic Planning in Government
- Developing and Using Performance Measures in Government
- Performance-Based Budgeting
- Program Evaluation and Analysis
- Performance Reporting in Government
- Auditing and Improving Performance Information
- Lean Six Sigma for Government
- Customer Service Strategies for Government
- Performance Reporting
- Performance Benchmarking for Government
- Balanced Scorecard Measurement and Management in Government

Financial Management

- The New Role of Financial Management in Government
- Implementing Internal Controls in Government
- Financial Reporting in Government: "Timely, Accurate and Useful"
- Auditing and Reducing Erroneous Payments in Government
- Performance-Based Grants Management
- Cost Accounting and Management (ABC)
- Federal Budget Process: Formulating, Justifying and Executing

Project Management

- Earned Value Project Management
- Project Management for Government
- Managing Project Risk
- Developing and Managing Project Teams
- Integrated Project Planning in Government
- Project Management for Government Procurement

Human Capital Management

- Human Capital Planning and Talent Management
- Employee Development Management
- Employee Performance Evaluation and Incentives
- Recruitment and Retention in Government
- Succession Planning and Implementation
- HR Performance Measurement
- Knowledge Management for Government
- Workforce Assessments: Aligning Mission and Competencies
- Managing Employee Morale and Work-Life Programs
- Employee Relations in Government
- Labor Negotiations in Government

Contracting and Acquisition Management

- Performance-Based Contracting
- Project Management for Government Procurement
- Managing Competitive Sourcing
- Advanced Performance-Based Acquisition: Solutions Development
- Structuring and Measuring a Most Efficient Organization (MEO) for A-76 Competitions
- Project and Acquisition Planning for A-76 Competitions
- Strategic Sourcing
- Ethics in Government Contracting

Information Technology Management

- IT Capital Planning and Investment Managment
- Information Security Management for Government
- Certification and Accreditation for Government IT Security
- IT Project Management
- IT Performance Measures
- Building Better IT Budget Justifications (Ex 300s)
- IT Enterprise Architecture

Administrative Management

- Government Administrative Management
- Leadership and Personal Effectiveness
- Project Management for Government Administrative Assistants
- Effective Communications for the Modern Government Administrative Assistant
- Event Planning for Government Administrative Assistants

Leadership and Change

- Leadership Strategies in the Public Sector
- Leading Organizational Change in Government
- Business Analysis and Critical Thinking in Government
- Effective Communication in Government
- Building Coalitions in Government
- Effective Negotiation for Government Leaders

For more information, contact Blake Zach at 703-894-0481 or Zach@PerformanceWeb.org

Access Complete Courses and Schedules at www.PerformanceWeb.org

About The Performance Institute

Transferring Knowledge to Transform Government



The Nation's Leader in Government Performance Management

The Performance Institute is a private think tank seeking to improve government performance through the principles of competition, accountability, performance and transparency. The Institute serves as the nation's leading authority and repository on performance-based management practices for government. Our mission is to identify, study and disseminate the leading management innovations pioneered by "best-in-class" organizations.

Through its national conferences on pressing issues, interactive training programs for government managers, best practice research and strategic consulting services, the Institute provides cutting-edge expertise in the design, implementation and evaluation of strategies to solve operational challenges and enhance organizational performance.

The Performance Institute is the nation's largest and most influential government reform think tank. More than 10,000 government managers participate in the Institute's forums and research projects each year. With offices on both coasts, the Institute is staffed by experts passionate about reforming government, and maintains an impressive array of expert advisory boards in many policy areas.

The Institute has testified on a wide range of government reform issues before Congress and state legislatures. With its emphasis on performance-based management reforms, the Institute has evaluated numerous government programs and initiatives and has offered recommendations for improving cost efficiencies and performance results. Its white papers and analyses are routinely used by government officials to reform programs, shape policy and drive change.

The Performance Institute
1515 N. Courthouse Road
Suite 600
Arlington, VA 22201
703-894-0481
fax 703-894-0482

Visit The Performance Institute online at:
www.PerformanceWeb.org

Receive CPE Credits and PDUs

Continuing Professional Education Accreditation

The Performance Institute is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville, TN 37219-2417. Web site: www.nasba.org

Project Management Professional® Certification Training

The Performance Institute has been reviewed and approved as a provider of project management training by the Project Management Institute. As a PMI Registered Education Provider (R.E.P), The Performance Institute has agreed to abide by PMI established quality assurance criteria. "PMI" and the PMI logo are service and trademarks registered in the United States and other nations; "PMP" is a certification mark registered in the United States and other nations; "PMBOK" and "CAPM" are trademarks registered in the United States and other nations by the Project Management Institute, Inc., which is not affiliated with The Performance Institute.

As a student at the Performance Institute, you will receive Professional Development Units (PDUs), required by PMI® to obtain the Certified Associate in Project Management (CAPMTM) or Project Management Professional (PMP®) certification. You can also gain credits towards re-certification.

You are required to verify at least 23 contact hours of specific instruction addressing learning objectives in project management to apply for CAPMTM certification and 35 contact hours to apply for PMP® certification and take the exam. As a Project Management Institute (PMI®) Global Registered Education Provider (REP), taking all three "Core Project Management Courses" fulfills this prerequisite.

GSA Schedule

Easy Access to Institute Consulting Services through MOBIS

(PI MOBIS Contract Number: GS-10F-0261M)

How Can I Register?

1. **ONLINE** at www.PerformanceWeb.org
2. **VIA FAX** to 703-894-0482
3. **VIA PHONE** to 703-894-0481
4. **VIA MAIL** to 1515 North Courthouse Road, Suite 600, Arlington, VA 22201

DELEGATE INFORMATION

NAME

TITLE

OFFICE

ORGANIZATION

ADDRESS

CITY STATE ZIP

TELEPHONE FAX

E-MAIL

PRIORITY CODE

PAYMENT INFORMATION

- ☐ TRAINING FORM
- ☐ PURCHASE ORDER
- ☐ CHECK (Accepted by mail only)
- ☐ CREDIT CARD

CREDIT CARD NUMBER

EXPIRATION DATE

NAME ON CARD

A CONFIRMATION OF YOUR REGISTRATION WILL BE EMAILED TO YOU WITHIN 2 BUSINESS DAYS.

Priority Code: P993-JT

COURSE SELECTIONS

Please Register Me for the Following Courses:

PROGRAM CODE	PROGRAM NAME	TUITION
		$1095
		$ 895*
		$ 795*
		$ 695*
		$ 495*
		FREE*

☐ **PLEASE ENROLL ME IN 6 CONTRACTING & ACQUISITION COURSES FOR DISCOUNTED PROGRAM RATES**

Group discounts are available. For information about discounts for groups of three or more, please contact Blake Zach at (703) 894-0481 or Zach@PerformanceWeb.org

* To qualify for these discounted tuition rates, you must register and submit payment for all of the programs at the same time. If you choose to register for courses individually you will be charged the full amount each time.

Need help customizing your training program?

Call one of our curriculum managers at 703-894-0481.

CANCELLATION AND QUALITY ASSURANCE POLICY

The Performance Institute strives to provide you with the most productive and effective educational experience possible. If after completing the course you feel there is some way we can improve, please write your comments on the evaluation form provided upon your arrival. Should you feel dissatisfied with your learning experience and wish to request a credit or refund, please submit it in writing no later than 10 business days after the end of the training to: Chris DeMaio, Chief Operating Officer, The Performance Institute, 1515 N. Courthouse Road, Suite 600, Arlington, VA 22201 (phone: 703-894-0481). We will evaluate individual complaints in a context of collective comments from the event. Note: A $150 service fee will be charged on cancellations received less than three weeks from the date of the event. A credit memo will also be sent reflective of that amount, which can be used for a future Performance Institute conference.

TRAINING LOCATION

Because the Institute offers convenient locations on both coasts, specific location details for each course will be sent out upon registration. City and state listings for each course are available in the "Individual Course Offerings" section of this catalog. Program participants are eligible for a discounted hotel rate at all locations.

IMPROVING ACQUISITION PERFORMANCE & CONTRACT MANAGEMENT



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Improving Acquisition Performance & Contract Management in Government

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